



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
1600 PACIFIC HIGHWAY, ROOM 402, SAN DIEGO, CALIFORNIA 92101-2422
(619) 531-5600

RYAN SHARP
ASSISTANT CLERK

ANN MOORE
ASSISTANT CLERK

May 6, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

Attached, for your information, is correspondence from the California Wildlife Conservation Board, regarding proposed projects and land acquisition.

Respectfully,


ANDREW POTTER

Attachment

cc: Ebony N. Shelton, Chief Administrative Officer
Dahvia Lynch, Deputy Chief Administrative Officer, Land Use and Environment Group
Board of Supervisors Communications Received

AJP: jse

From: Mahony, Drew@Wildlife
To: [FGG, Public Comment](#)
Cc: senator.seyarto@senate.ca.gov; assemblymember.demaio@assembly.ca.gov; [Senator Padilla](#); [Wilson-Olgin, Erinn@Wildlife](#); [Cruz, Kim@Wildlife](#); [Dunn, Alexa@Wildlife](#)
Subject: [External] San Diego Board of Supervisors letters to distribute from the Wildlife Conservation Board (WCB) - Project IDs: 2025086, 2024084 & 2025033
Date: Tuesday, May 5, 2026 10:49:51 AM
Attachments: [2025086_SkylineNoPhII_BOS_DM_DV.docx.pdf](#)
[JN_2024084_SFVWA_Nelson_BOS_DM.docx.pdf](#)
[JN_2025033_SFVWA_Molloy_BOS_DM.docx.pdf](#)
Importance: High

To whom it may concern,

Please see attached letters to your Board of Supervisors regarding projects proposed to the Wildlife Conservation Board for its May 28, 2026, Board Meeting that falls within your jurisdiction.

Please distribute to appropriate staff. If you have any questions, feel free to contact the staff person listed in the letter. You can find additional information on our upcoming meeting at wcb.ca.gov.

County - Please reply to this email to confirm receipt.

Looking forward,

Drew Mahony

Office Technician/Administrative
Wildlife Conservation Board
(916) 902-8218

Physical Address | 715 P Street, 17th Floor | Sacramento, CA 95814

Mailing Address | P.O. Box 944209 | Sacramento, CA 94244-2090



GAVIN NEWSOM, Governor
NATURAL RESOURCES AGENCY
DEPARTMENT OF FISH AND WILDLIFE
WILDLIFE CONSERVATION BOARD
Mailing Address: P.O. Box 944209
Sacramento, California 94244-2090
www.wcb.ca.gov
(916) 445-8448

San Diego County Board of Supervisors
1600 Pacific Highway
San Diego, California 92101
PublicComment@sdcounty.ca.gov

SKYLINE NORTH PHASE II
SAN DIEGO COUNTY
PROJECT ID: 2025086

Dear Board Members:

The California Department of Fish and Wildlife (CDFW), through the Wildlife Conservation Board (WCB), is involved in a land acquisition program focused on the long-range protection and enhancement of habitat for fish and wildlife. The CDFW identifies sites considered for acquisition in response to public interest, legislative mandate and departmental goals.

I am writing to advise you that the WCB will consider the allocation of a grant to the Endangered Habitats Conservancy to assist in its acquisition of 1,226± acres of land for the preservation and enhancement of wildlife habitat located in San Diego County and identified as Assessor's Parcel Nos. 521-120-26, 522-060-16, 522-060-17, 522-060-18, 522-060-21, 522-060-22, 522-060-23, 522-060-25, 522-060-28, 522-060-30, 522-060-34, 522-060-35, 522-060-36, 522-060-37, 522-060-38, 522-060-44, 522-060-45; 522-070-01, 522-070-05, 522-070-10; 522-150-06, 522-161-05, and 522-230-09. The proposal is scheduled to be presented at the May 28, 2026, Board meeting. An electronic copy of the preliminary agenda is available for your review at www.wcb.ca.gov under News and Announcements. A more complete description of each proposal will be contained in the final meeting Agenda, which will be available at www.wcb.ca.gov ten days prior to the Board meeting.

If you have any questions about this proposal or need additional information, please feel free to contact us at (916) 445-8448.

Sincerely,

DocuSigned by:

F2A457B0E7174C7...

Jennifer M. Norris, PhD
Executive Director

San Diego County Board of Supervisors
Skyline North Phase II
Project ID: 2025086
Page Two

Enclosure(s)

ec: The Honorable Steve Padilla
senator.padilla@senate.ca.gov

The Honorable Brian W. Jones
senator.jones@senate.ca.gov

The Honorable Carl DeMaio
assemblymember.demaio@assembly.ca.gov

Erinn Wilson-Olgin, Regional Manager
CDFW, South Coast Region (5)



GAVIN NEWSOM, Governor
NATURAL RESOURCES AGENCY
DEPARTMENT OF FISH AND WILDLIFE
WILDLIFE CONSERVATION BOARD
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San Diego County Board of Supervisors
1600 Pacific Highway
San Diego, CA 92101
publiccomment@sdcounty.ca.gov

SAN FELIPE VALLEY WILDLIFE AREA, EXPANSION 8 (NELSON)
SAN DIEGO COUNTY
PROJECT ID: 2024084

Dear Board Members:

The California Department of Fish and Wildlife (CDFW), through the Wildlife Conservation Board (WCB), is involved in a land acquisition program focused on the long-range protection and enhancement of habitat for fish and wildlife. The CDFW identifies sites considered for acquisition in response to public interest, legislative mandate and departmental goals.

I am writing to advise you that the WCB will consider the acquisition of fee title of 114± acres of wildlife habitat located in San Diego County and identified as Assessor's Parcel No. 113-010-13-00, 113-010-18-00, 113-010-19-00, and 113-010-21-00. The proposal is scheduled to be presented at the May 28, 2026, Board meeting. An electronic copy of the preliminary agenda is available for your review at www.wcb.ca.gov under News and Announcements. A more complete description of each proposal will be contained in the final meeting Agenda, which will be available at www.wcb.ca.gov ten days prior to the Board meeting.

If you have any questions about this proposal or need additional information, please feel free to contact us at (916) 445-8448.

Sincerely,

DocuSigned by:

F2A457B0E7174C7...

Jennifer M. Norris, PhD
Executive Director

Enclosure(s)

San Diego County Board of Supervisors
San Felipe Valley Wildlife Area, Expansion 8 (Nelson)
Project ID: 2024084
Page Two

ec: The Honorable Kelly Seyarto
senator.seyarto@senate.ca.gov

The Honorable Carl DeMaio
assemblymember.demaio@assembly.ca.gov

Erinn Wilson-Olgin, Regional Manager
CDFW, South Coast Region (5)



GAVIN NEWSOM, Governor
NATURAL RESOURCES AGENCY
DEPARTMENT OF FISH AND WILDLIFE
WILDLIFE CONSERVATION BOARD
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Sacramento, California 94244-2090
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San Diego County Board of Supervisors
1600 Pacific Highway
San Diego, CA 92101
publiccomment@sdcountry.ca.gov

SAN FELIPE VALLEY WILDLIFE AREA, EXPANSION 9 (MOLLOY)
SAN DIEGO COUNTY
PROJECT ID: 2025033


Dear Board Members:

The California Department of Fish and Wildlife (CDFW), through the Wildlife Conservation Board (WCB), is involved in a land acquisition program focused on the long-range protection and enhancement of habitat for fish and wildlife. The CDFW identifies sites considered for acquisition in response to public interest, legislative mandate and departmental goals.

I am writing to advise you that the WCB will consider the acquisition of fee title of 38± acres of wildlife habitat located in San Diego County and identified as Assessor's Parcel No. 113-010-16-00. The proposal is scheduled to be presented at the May 28, 2026, Board meeting. An electronic copy of the preliminary agenda is available for your review at www.wcb.ca.gov under News and Announcements. A more complete description of each proposal will be contained in the final meeting Agenda, which will be available at www.wcb.ca.gov ten days prior to the Board meeting.

If you have any questions about this proposal or need additional information, please feel free to contact us at (916) 445-8448.

Sincerely,

DocuSigned by:

F2A457B0E7174C7...

Jennifer M. Norris, PhD
Executive Director

Enclosure(s)

San Diego County Board of Supervisors
San Felipe Valley Wildlife Area, Expansion 9 (Molloy)
Project ID: 2025033
Page Two

ec: The Honorable Kelly Seyarto
senator.seyarto@senate.ca.gov

The Honorable Carl DeMaio
assemblymember.demaio@assembly.ca.gov

Erinn Wilson-Olgin, Regional Manager
CDFW, South Coast Region (5)



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
1600 PACIFIC HIGHWAY, ROOM 402, SAN DIEGO, CALIFORNIA 92101-2422
(619) 531-5600

RYAN SHARP
ASSISTANT CLERK

ANN MOORE
ASSISTANT CLERK

May 18, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

Attached, for your information, is correspondence from Christina Caro and Tom Enslow, of Adams Broadwell Joseph & Cardozo Attorneys at Law, regarding the adoption of proposed Battery Energy Storage Systems and its Workforce Safety Standards.

Respectfully,


ANDREW POTTER

Attachment

cc: Ebony N. Shelton, Chief Administrative Officer
Dahvia Lynch, Deputy Chief Administrative Officer, Land Use & Environment Group
Board of Supervisors Communications Received

AJP: jse

ADAMS BROADWELL JOSEPH & CARDOZO

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RACHAEL E. KOSS
AIDAN P. MARSHALL
ALAUORA R. McGUIRE

Of Counsel

DANIEL L. CARDOZO
MARC D. JOSEPH

May 15, 2026

Via Email and Overnight Mail

Chair Terra Lawson-Remer
Hon. Members of the Board of Supervisors
c/o Andrew Potter, Executive Officer/Clerk of
the Board
County of San Diego
1600 Pacific Highway, Room 402
San Diego, California 92101
Email: Terra.Lawson-Remer@sdcounty.ca.gov
District1community@sdcounty.ca.gov
joel.anderson@sdcounty.ca.gov
Monica.MontgomerySteppe@sdcounty.ca.gov
jim.desmond@sdcounty.ca.gov
Andrew.Potter@sdcounty.ca.gov
PublicComment@sdcounty.ca.gov

San Diego County Fire Protection District
Attn: Hon. Chief Tony Mecham
County Operations Center
5560 Overland Avenue, Suite 400
San Diego, CA 92123
Email: Fire@sdcounty.ca.gov

Re: **Workforce Safety Standards for Battery Energy Storage Systems**

Dear Chair Lawson-Remer, Board Members, Mr. Potter, Chief Mecham:

On behalf of International Brotherhood of Electrical Workers Local 569 ("IBEW 569"), we submit these comments regarding the County of San Diego ("County") Board of Supervisors ("Board") consideration of the County's proposed Workforce Safety Standards for Battery Energy Storage Systems ("BESS", "BESS Workforce Standards").

IBEW 569 appreciates the County's attention to public safety and fire prevention related to BESS installations and energy storage management system ("ESMS") facilities by considering the adoption of minimum workforce safety standards for BESS and EMSM facilities through the San Diego County Fire Protection District ("SDCFPD" or "Fire District"). Establishing workforce safety standards for the installation, maintenance, repair, and decommissioning of BESS and ESMS facilities is critical to ensure the safe and consistent integration of these systems and their components in the County.

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This letter addresses pending recommendations for workforce standards for BESS and ESMS facilities, and responds to questions and concerns raised by staff and members of the public during the SDCFPD's public comment period on the proposed BESS Workforce Standards.¹ IBEW 569 supports the adoption of minimum workforce safety standards for BESS facilities at or above 80 kwh into the San Diego County Consolidated Fire Code, including requiring that state-certified electricians perform all electrical work involving the installation, assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of BESS and ESMS facilities, and requiring a minimum percentage of onsite certified electricians be certified in Energy Storage and Microgrid Training and Certification ("ESAMTAC").²

Adopting the proposed BESS Workforce Standards would address critical gaps in existing BESS safety standards and would not preclude subsequent State action or regulation of BESS facilities. The State sets minimum standards that the County must enforce. However, the County has broad authority under the California Constitution to adopt additional local safety standards, including requiring ESAMTAC certification. The adoption of installer training requirements is a legitimate exercise of the County's police power to address public safety.³ The certification requirement would not delegate legislative authority to a private organization or provide unauthorized public benefits.⁴

With regard to the scope of "electrical work" covered by the proposed standards, the applicable definition can be found in the California Code of Regulations' discussion of general electricians, addressed below.⁵ Additionally, proposals by other commenters to rely solely on the California Public Utilities Commission ("CPUC") General Order 167 ("GO 167") and National Fire Protection Association ("NFPA") standards, including NFPA 70E, NFPA 72, and NFPA 69, do not ensure safe adequate BESS installation or fire prevention, and would not adequately protect public safety, because none of those are directly relevant to the installation of energy storage systems and none of those are installer training and certification standards. Finally, recent proposals to rely on a skilled and trained workforce⁶ for utility-scale BESS and ESMS projects, instead of certified and

¹ See County BESS Workforce Standards proposal, available at [Workforce Safety Standards for Battery Energy Storage Systems | Engage San Diego County](#) (last visited 5/10/26).

² See ESAMTAC, <https://esamtac.org/> (certified expertise in the safe and effective installation, commissioning, maintenance, retrofitting, and decommissioning of energy storage and microgrid equipment and systems).

³ Cal. Const. Art. 11, § 7; Bus. & Prof. Code § 16100.

⁴ See Cal. Const. Art XVI § 6 (public purpose exception to Cal. Constitution gift clause).

⁵ 8 Cal. Code of Regs. § 290.1.

⁶ Skilled and trained workforce is defined in Public Contract Code § 2600 et seq.

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ESAMTAC-trained electrician requirements, is not specific enough to ensure that BESS and ESMS electrical installers and workers have the most current safety training for electrical work on energy storage systems. Skilled and trained workforce requirements ensure high standards of safety, training and experience on jobsites, but ESAMTAC ensures that workers are trained in the most up-to-date energy storage system safety standards. Skilled and trained requirements may also require more administrative oversight and enforcement by County staff than the proposed BESS Workforce Standards.

IBEW 569 urges the County to adopt SDCFPD's currently proposed BESS Workforce Standards.

I. The County Should Adopt Minimum Workforce Safety Standards for BESS and ESMS Facilities Which Ensure Necessary Training and Certification for Electrical Work

In February 2026, the Board of Supervisors asked County staff to report on options for setting minimum safety standards for workers involved in BESS and ESMS projects, including requiring that a certified electrician perform all electrical work involving the installation, assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of BESS and ESMS facilities, and requiring that a minimum percentage of the certified electricians have ESAMTAC certification.⁷

The current BESS Workforce Standards presented by County staff identify the following minimum workforce safety standards for facilities at or above 80 kwh:

1. Require a state-certified electrician perform all electrical work involving the installation, assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of a BESS facility or ESMS.
2. Require a minimum percentage (15 %) of the onsite certified electricians performing electrical work involving the installation, assembly, testing,

⁷ See February 10, 2026 Statement of Proceedings of Board of Supervisors / SDCFPD Meeting, p. 4. available at https://ehq-production-us-california.s3.us-west-1.amazonaws.com/3453edfd65615081cc2c767b448e6323781213e6/original/1773773074/27169cdc3fe4da835e0e5d150904a886_Minutes.pdf?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIA4KKNQAKIPIPQP5NM%2F20260512%2Fus-west-1%2Fs3%2Faws4_request&X-Amz-Date=20260512T163039Z&X-Amz-Expires=300&X-Amz-SignedHeaders=host&X-Amz-Signature=3a267f48e720761e015cba55b4bbfbf010d622f87034b0347cc340a3c8a2a0a7 (last visited 5/11/26).

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commissioning, maintenance, repair, retrofitting, and decommissioning of a BESS or ESMS facility obtain ESAMTAC certification.⁸

IBEW 569 supports this proposal and recommends incorporating the BESS Workforce Standards into the San Diego County Consolidated Fire Code.⁹ Given the complexity and potential hazards of BESS and ESMS systems, these standards are critical to ensuring that individuals performing electrical work on BESS and ESMS systems possess the specialized skills and qualifications needed to effectively reduce safety risks.

IBEW 569 also supports the recommendation to require C-10 licensed contractors on BESS at or above 80 kwh, as proposed by the National Electrical Contractors Association, San Diego Chapter.¹⁰ C-10 contractors are required by law to only use state-certified electricians to perform electrical work. The California Department of Industrial Relations (“DIR”) Electrician Certification Program certifies electricians for purposes of C-10 compliance.¹¹ Certification of electricians is not required for contractors licensed under different classes. Other contractors, including General A and B contractors, are therefore not required to use state-certified electricians to perform electrical work. Instead, they can hire and use workers off the street who do not have the necessary training or experience to perform electrical work for BESS facilities.

Incorporating the proposed BESS Workforce Standards into the San Diego County Consolidated Fire Code would directly address the significant risks posed by unqualified personnel working on complex energy storage technologies. Without clear countywide workforce standards, the risk of errors and failures during BESS installation and operation remains unacceptably high.

A. Local BESS Workforce Standards Would Not Preclude State Action

Staff asked whether adopting local Countywide BESS minimum workforce standards would preclude State action by the California State Licensing Board (“CSLB”) or other State BESS rulemaking. It would not.

⁸ [Workforce Safety Standards for Battery Energy Storage Systems | Engage San Diego County.](#)

⁹ See April 8, 2026 letter from IBEW 569 to SDCFPD re: Establishing Workforce Safety Standards for Battery Energy Storage Systems.

¹⁰ See March 24, 2026 letter from NECA San Diego Chapter to SDCFPD re: Support For Minimum Workforce Safety Standards on BESS Facilities.

¹¹ See DIR, Electrician certification program, available at <https://www.dir.ca.gov/dlse/ecu/electricaltrainee.htm> (last visited 5/11/26).

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The County has authority to adopt the proposed BESS Workforce Standards pursuant to the County's general police power to protect the order, safety, health, morals and general welfare of County citizens.¹² Workforce standards, which include "conditions of employment" like the proposed Standards, are an area where the State has not preempted local regulation where local regulation implements more stringent standards.¹³ The Labor Code clarifies that state worker mandates "shall not be deemed to restrict the exercise of local police powers in a more stringent manner."¹⁴

In this case, any State action would set a floor for minimum local regulations. The County cannot allow work to be done that does not meet State requirements, but the County can set its own more burdensome local requirements. The County's proposed BESS Workforce Standards would incorporate existing State electrician certification requirements and ensure that electricians on BESS and ESMS facilities in the County have the advanced training necessary for safely handling BESS and ESMS equipment and mitigating the unique fire and safety risks posed by these systems. This is a permissible area for County regulation.

Other California jurisdictions have successfully implemented workforce standards for technical and safety-critical tasks, highlighting the importance of qualified professionals in protecting public safety. For example, Los Angeles County requires that technicians working for contractors that perform plumbing or gas fitting work must meet certain workforce qualification requirements, including passing a competency examination, and requires registration of maintenance electricians.¹⁵ The City of Los Angeles imposes similar requirements to ensure that individuals performing these tasks are adequately trained and qualified.¹⁶ More recently, in March 2026, the City of San Marcos/San Marcos Fire Department updated their protection guidelines for energy storage systems to require contractors to have a C-10 license to perform work on BESS facilities with a capacity greater than 80kwh.¹⁷

¹² Cal. Const. Article XI, section 7; *In re Rameriz* (1924) 193 Cal. 633, 649-650; *Chow v. Santa Barbara* (1933) 217 Cal. 673, 702 (Under modern conditions, police power includes general welfare which embraces regulations to promote economic welfare, public convenience, and general prosperity of the community); 89 Ops. Cal. Atty. Gen. 502 (1990) (ordinances setting wage and apprenticeship standards for private construction projects are valid exercise of police power).

¹³ Labor Code § 1205(a)(3), (c).

¹⁴ Labor Code § 1205(c); see *RUI One Corp. v. City of Berkeley* (9th Cir., 2004) 371 F.3d 1137, 1141-2, 1157 (upholding living wage ordinance against contractual and constitutional challenges).

¹⁵ Los Angeles County Plumbing Code § 105 *et seq.*; Los Angeles County Code, Title 27 Sec. 82-4(d).

¹⁶ Los Angeles Plumbing Code § 94.103.13.0.

¹⁷ See City of San Marcos/San Marcos Fire Department, 2026 Protection Guidelines for Lithium-Ion BESS Facilities, Item 16, available at <https://www.sanmarcosca.gov/files/assets/city/v/1/public>.

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The County's proposed BESS Workforce Standards would not conflict with the current State rulemaking at the CSLB. The CSLB rulemaking regarding the use of C-10 contractors on BESS facilities at or above 80 kwh simply involves the scope of work that a particular contractor license is permitted to perform under State law.¹⁸ The proposed BESS Workforce Standards are consistent, and would not conflict with, the outcome of the CSLB rulemaking. In the unlikely event that a future conflict arose, State law ensures that the statewide standards would prevail, notwithstanding that the County is a charter county.¹⁹

Finally, State contractor licensing requirements are business licenses.²⁰ They do not regulate or impose training standards on workers, and installers are not the same as contractors. The proposed ESAMTAC certification goes beyond State contractor licensing requirements to ensure that the workers actually installing these systems have undergone training related to safe and effective assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of energy storage and microgrid systems.²¹

B. The County Can Require ESAMTAC Certification for Electrical Work Performed at BESS and ESMS Facilities to Address Public Safety

Staff asked whether the County can require a specialized certification from ESAMTAC on a countywide basis. It can. Under California law, a county may require workers to obtain safety certification from a private organization as a legitimate exercise of police power when the requirement is related to a legitimate public safety interest, does not conflict with state law, and does not delegate

[safety/fire-department/documents/fire-prevention-standards-amp-forms/san-marcos-bess-guidelines-v22026.pdf](#) (last visited 5/11/26).

¹⁸ See CSLB Notice of Proposed Rulemaking re Battery Energy Storage Systems, 4/28/23, available at <https://perma.cc/A7YU-CYCM> (last visited 5/11/26); CSLB Initial Statement of Reasons, 4/28/23, available at https://www.cslb.ca.gov/Resources/LawsAndRegulations/2023/BESS_ISOR_OAL.pdf (last visited 5/11/26).

¹⁹ *Sherwin-Williams Co. v. City of Los Angeles* (1993) 4 Cal.4th 893, 897 (where local ordinance conflicts with state law, it is preempted and void); Cal. Const. Art. 11, § 4(g); *Dibb v. County of San Diego* (1994) 8 Cal.4th 1200, 1207 (charter counties not subject to broad home rule authority as charter cities); *Cultiva La Salud v. State of California* (2023) 89 Cal.App.5th 868, 875 (charter counties cannot invoke "statewide concern" analysis that protects charter cities. Instead, charter county ordinances are preempted when they conflict with state law through duplication, contradiction, or field occupation under Cal. Const. Art. XI, Section 7).

²⁰ See e.g. CSLB Licensing Classifications, available at https://www.cslb.ca.gov/about_us/library/licensing_classifications/ (last visited 5/11/26).

²¹ See ESAMTAC, <https://esamtac.org/> (last visited 5/11/26).

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legislative authority to the private organization.²² The County's proposed ESAMTAC certification falls within these parameters.

SDCFPD holds broad authority under the California Fire Code ("CFC") and its regulatory jurisdiction to establish workforce guidelines for electrical work performed on BESS and ESMS facilities. Chapter 1 of the CFC grants fire code officials the authority to create safety requirements for matters that are not provided for in the existing fire code. Specifically, Section 102.9 provides: "Requirements that are essential for the public safety of an existing or proposed activity, building or structure, or for the safety of the occupants thereof, that are not specifically provided for by this code, shall be determined by the fire code official."²³ This provision empowers fire code officials to address emerging technologies or unique risks, such as those posed by BESS and ESMS, by developing standards that go beyond existing fire safety measures. The County can therefore require ESAMTAC certification as a legitimate exercise of its police power because the requirement is intended to address public safety related to BESS and ESMS facilities.²⁴

ESAMTAC is a nonprofit, brand neutral, national training and certification program based on safety standards and codes developed and/or approved by the NFPA, National Electrical Installation Standards ("NEIS"), National Electrical Code ("NEC"), American National Standards Institute ("ANSI"), and the Electric Power Research Institute ("EPRI").²⁵ ESAMTAC training is available to all qualified installers, whether union or non-union. ESAMTAC credentials ensure that workers and electrical contractors have undergone extensive training related to safe and effective assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of energy storage and microgrid systems.²⁶ A County ESAMTAC certification requirement would therefore be directly targeted at protecting public safety and worker safety by ensuring that workers on all stages of BESS and ESMS installation, maintenance, and decommissioning, are adequately trained.

Requiring ESAMTAC certification would not delegate legislative authority to a private organization because ESAMTAC would not conflict with applicable regulatory standards for BESS and ESMS work. ESAMTAC training and certification implements existing standards from NFPA, NEIS, NEC, ANSI, and the

²² Cal. Const. Art. XI, § 7; Bus. & Prof. Code § 16100.

²³ California Fire Code § 102.9.

²⁴ *Id.*

²⁵ See <https://esamtac.org/>.

²⁶ *Id.*

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EPRI,²⁷ ESAMTAC does not decide what the applicable safety standards should be. Rather, ESAMTAC trains electrical contractors and workers in existing standards. While ESAMTAC updates its certification process to mirror updates in the national and state codes and standards, ESAMTAC does not set codes and standards because it is not a codes and standards body and that would be out of scope of its nonprofit organization stated mission.²⁸ Moreover, State Law requires construction to follow the State Building Standards Law, and is preemptive. Finally, ESAMTAC will be adopted by the County as a minimum training requirement, not to set forth installation standards. ESAMTAC ensures that installers have a minimum level of training to ensure they are able to safely implement installation and operation and decommissioning requirements set forth by State, national and local standards, and are able to safely and accurately implement manufacturer installation instructions.

A County ESAMTAC safety certification requirement would designate the private organization's certification program as the required credential, but the County, and applicable State, national and local agencies, would retain authority to determine the underlying standards that the certification implements. And the County would designate when the certification is required, and how violations are enforced. This is consistent with California law holding that incorporating standards of private organizations into agency regulations is valid and does not constitute an unlawful delegation of legislative authority.²⁹

Moreover, requiring ESAMTAC certification would not constitute an unfair public benefit under the public purpose exception to the State Constitution's gift clause³⁰ because the County would not be transferring public money to ESAMTAC. The County would be regulating conduct of workers on BESS and ESMS facilities within the County by requiring electrical contractors and workers to pay private fees for ESAMTAC safety certification as a condition of working. ESAMTAC would not be performing the work being regulated. ESAMTAC merely provides a safety certification for the contractors and workers that would be performing the work.³¹ This is consistent with caselaw holding that "expenditures of public funds or property which involve a benefit to private persons are not 'gifts' within meaning of

²⁷ See <https://esamtac.org/>.

²⁸ See <https://esamtac.org/>.

²⁹ *Int'l Assn. of Plumbing etc. Officials v. Cal. Building Stds. Com.* 1997) 55 Cal.App.4th 245, 254; *Plastic Pipe & Fittings Assn. v. Cal. Building Standards Com.* (2004) 124 Cal.App.4th 1390, 1410 (government agency — not private organization — must retain ultimate control over which standards are adopted).

³⁰ Cal. Const. Art XVI § 6.

³¹ See <https://esamtac.org/>.

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state constitutional prohibition of gift of public funds, if those funds are expended for a public purpose.”³²

Finally, a County ESAMTAC certification requirement would not involve the transfer of public funds. Requiring electrical contractors and workers to pay fees to a private certifying organization does not involve the County appropriating, giving, or lending public money to ESAMTAC. Instead, private individuals (or their employers) are paying private fees to a private body as a condition of doing business. This is permissible and would not constitute an unfair public benefit.³³

C. The Definition of “Electrical Work” Is in the California Code of Regulations for Electrician Certification

Staff and commenters asked for more information on the definition of “electrical work” under the proposed BESS Workforce Standards. The definition of electrical work performed by a certified electrician is set forth at Title 8, § 290.1 of the California Code of Regulations. This section states that the work of certified general electricians encompasses “installing, constructing or maintaining any electrical system that is covered by the National Electric Code.”³⁴ This is a standard definition that is well understood in the industry because it is part of the definition of a general electrician for purposes of defining the scope of work that falls within the requirement for C-10 electrical contractor to use certified electricians. This is also the most detailed definition, since the Code sets forth the individual components and actions required to install the covered electrical systems, including for BESS and ESMS systems.

In the alternative, the County could define electrical work as “any work that falls within the scope of work for electricians set by the Department of Industrial Relations (DIR) as part of its prevailing wage determinations applicable to San Diego County.” As part of its prevailing wage determination, the DIR lists the scope of work for each individual craft which is used to identify what work triggers what prevailing wage rate.³⁵ These scopes are familiar to the construction industry since they apply to all public works projects and are used to delineate work processes for the purposes of determining if such work is electrical work subject to electrician

³² *Preston v. State Bd. of Equalization* (2001) 25 Cal.4th 197, 225; *West Contra Costa Unified School Dist. v. Sup. Ct.* (2024) 103 Cal.App.5th 1243, 1256.

³³ Cal. Const. Art XVI § 6; *Los Angeles County v. La Fuente* (1942) 20 Cal.2d 870, 877 (“If the money is for a public purpose, the appropriation is not a gift even though private persons are benefited by the expenditure”); *West Contra Costa Unified School Dist.*, 103 Cal.App.5th 1243.

³⁴ 8 Cal. Code Regs. § 290.1.

³⁵ The electrician scopes of work for San Diego County can be found on the DIR website at <https://www.dir.ca.gov/oprl/2026-1/PWD/Determinations/Subtrades/SDI.html>.

prevailing wage rates or work of another craft subject to that craft's prevailing wage rate. While the proposed BESS Workforce Standards do not require payment of prevailing wage, the scope of work definitions for prevailing wages set by the DIR nonetheless provide an industry standard description of what is considered electrical work. However, as detailed as the DIR scope of work definitions are, they still are not as detailed as what is set forth in the National Electric Code. For that reason, IBEW 569 recommends adopting the definition of electrical work found in Title 8, § 290.1 of the California Code of Regulations.

One commenter suggested using the definition of electrical work in Labor Code § 108(c).³⁶ However, this definition is inappropriate because it is not, as claimed, a definition of "electrical work," but rather is a regulatory definition of electricians that is used for the threshold determination of when the statutory certified electrician requirement applies. By its very terms ("electricians includes"), this definition is not comprehensive. Furthermore, the scope of work that applies when the certified electrician requirement applies under Labor Code section 108(c) is expressly set forth in implementing regulations at Title 8, section 290.1 – which is the definition that we have proposed.

Section 290.1 clarifies that the work of certified general electricians encompasses "installing, constructing or maintaining any electrical system that is covered by the National Electric Code. Reliance on the incomplete and inapplicable definition of "electricians" set forth in Labor Code § 108(c) could result in an absurd interpretation that training in the installation of BESS and ESMS is only necessary when making the final connection between electrical devices. The scope of work set forth in the National Electric Code demonstrates that electrical work and electrical safety installation knowledge goes far beyond simply making a final electrical connection. Critical work on BESS and ESMS facilities that should be subject to the BESS Workforce Standards could escape basic safety requirements if Section 108 were utilized.

If staff believes a definition of "electrical work" is needed, **we recommend defining "electrical work" as "work covered by the National Electric Code."** In the alternative, the County could define "electrical work" as "any work that falls within the scope of work for electricians set by the Department of Industrial Relations (DIR) as part of its prevailing wage determinations applicable to San Diego County."

³⁶ See May 4, 2026, LiUNA Local 89 comments to San Diego County Re: Workforce Safety Standards BESS Board . Scheduling.

D. Existing CPUC and NFPA Safety Standards Do Not Address Worker Training for BESS and ESMS Systems

SDCFPD received comments recommending that the County rely on existing CPUC and NFPA safety standards (CPUC General Order (“GO”) 167, NFPA 70E, NFPA 72 and NFPA 69), QEW-based training programs, and OEM-led, system-specific training in place of the County’s proposed BESS Workforce Standards with ESAMTAC and universal certified electrician requirements.³⁷ While well-intended, these comments misunderstand the specific worker training proposed by the BESS Workforce Standards to comprehensively address safety issues arising from assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of BESS and ESMS projects.

Reliance on existing standards does not address the worker training for electrical installers that the County has determined is relevant to protecting public safety and preventing fires and BESS emergencies. Incorrectly performed electrical work can result in catastrophic fires, explosions, or environmental damage, posing significant risks to life, property, and public resources. Workforce requirements – such as mandating certifications, training in applicable standards, and experience specific to energy storage systems – help ensure that individuals performing this critical work are adequately equipped to prevent these risks.

The alternatives proposed by commenters do not ensure installers are actually trained and qualified to install energy storage systems. For example, CPUC GO 167 is not applicable. It primarily addresses Maintenance and Operation Standards for Electric Generating Facilities.³⁸ While GO 167 was amended in 2025 to add some requirements for BESS facilities (GO 167-C),³⁹ the amended Order 167-C is limited to BESS operational standards and emergency response and emergency action plans – not installation of BESS and ESMS systems – and failed to establish minimum electrician workforce training requirements for BESS, as proposed here.⁴⁰

³⁷ See March 2026 letters to SDCFPD from Terra-Gen, CESA / ACP-CA, and Cleantech San Diego.

³⁸ CPUC General Order 167, Enforcement of Maintenance and Operation Standards for Electric Generating Facilities, available at CPUC General Orders webpage, <https://www.cpuc.ca.gov/Home/Proceedings-and-Rulemaking/CPUC-general-orders> (last visited 5/11/26).

³⁹ CPUC General Order 167-C (amended by Resolution ESRB-13 Adopted March 13, 2025), available at <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M567/K474/567474805.pdf> (last visited 5/11/26).

⁴⁰ The General Order 167-C Statement of Reasons clarifies that ESS requirements are limited to operation and maintenance, and expressly rejected proposed certified electrician standards and ESAMTAC certification requirements for electricians. CPUC Resolution ESRB-13 (May 20, 2025) at p. 13, available at <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M566/K891/566891631.pdf> (last visited 5/11/26).

CPUC GO 167 is also not a training and certification program. Even if it were applicable, its mere existence does not demonstrate that installers have been trained and certified to implement its requirements.

NFPA 70E, NFPA 72, and NFPA 69 standards are also not relevant. They also are not worker training certification programs. Rather, they are standards for worker safety (NFPA 70E), fire detectors and alarms (NFPA 72), and industrial explosion prevention/hazard mitigation systems (NFPA 69). None are specific to BESS or ESMS and none provide training and certification to workers.

Moreover, many of the relevant procedures of these NFPA standards, as well as other installation requirements for safe BESS installation, are covered in the ESAMTAC training and certification program. ESAMTAC was developed in partnership with NFPA⁴¹ so that it would be consistent with NFPA requirements. Unlike the NFPA standards alone, ESAMTAC certifies that workers have been trained in implementing applicable standards. General references to standards are not relevant to the issue of whether a worker has been properly trained to safely install BESS and ESMS systems. To simply state that installation must comply with those standards is meaningless without a requirement that installers actually be trained in the relevant standards. Currently, only ESAMTAC provides the relevant installer training and certification. The County's proposed BESS Workforce Standards recognize this distinction.

Furthermore, ESAMTAC certification provides a training floor which any qualified installer can obtain – union or non-union – and can be complemented with additional training. The best practice is to also be trained in the specific system being installed. However, the manufacturer trainings proposed by commenters are not mandated, are inconsistent in quality, are limited in scope, and do not provide foundational safety and electrical installation training. By contrast, ESAMTAC ensures that installers have minimum relevant training in BESS installation. To the extent that individual contractors may want their technicians to have additional safety training, IBEW 569 supports additional training, including product-specific manufacturer training where available, contractor training, or through apprenticeships. IBEW 569 members, for example, have substantial additional electrical safety training through their apprenticeship programs, in addition to ESAMTAC certification.

None of the commenters' proposals cite an equivalent or relevant alternative installer training and certification program to ESAMTAC that could be uniformly required. IBEW 569 therefore supports the proposed adoption of a minimum

⁴¹ <https://esamtac.org/>.

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ESAMTAC certification requirement for certified electricians working on BESS or ESMS facilities.

E. The Proposed BESS Workforce Standards Provide ESS-Specific Training and Less Burdensome Administrative Enforcement than Skilled and Trained Workforce Standards

Staff received comments recommending the use of a skilled and trained workforce, as defined in Public Contract Code § 2600, instead of the proposed BESS Workforce Standards. Skilled and trained requirements mandate that a percentage of workers on a project be graduates of state-approved apprenticeship programs. While apprenticeship training provides workers with excellent skills necessary to construct and maintain complex infrastructure, it is not specific to the ESS training and certification requirements proposed by the BESS Workforce Standards. A skilled and trained requirement does not ensure that workers have been trained in the most up-to-date ESS standards, as ESAMTAC certification does. Reliance on a skilled and trained workforce may not be as protective of public safety related to electrical work on BESS and ESMS facilities.

The proposed BESS Safety Standards require that state-certified electricians perform all electrical work involving the installation, assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of BESS and ESMS facilities, and require a minimum percentage (15 %) of onsite certified electricians performing electrical work obtain ESAMTAC certification.⁴² Electrical work is a major component of safe BESS and ESMS installation and operation. The proposed Standards directly address the risks posed by complex energy storage technologies, and would ensure that BESS and ESMS projects in the County use the most trained and qualified workers for electrical work on energy storage systems.

Skilled and trained requirements may also require additional oversight and enforcement by County staff than the proposed certified electrician and ESAMTAC standards. State certification and ESAMTAC certification are self-executing. Participants in the ESAMTAC courses receive instruction, testing and credentialing based on skills attainment.⁴³ Workers can provide their State certification and ESAMTAC certifications to the County or any other necessary parties for verification.

⁴² [Workforce Safety Standards for Battery Energy Storage Systems | Engage San Diego County](#).

⁴³ See <https://esamtac.org/>.

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II. Conclusion

IBEW 569 urges the County to move forward with the proposed BESS Workforce Standards and require a skilled, highly trained, and ESAMTAC-certified workforce for the life cycle of BESS and ESMS facilities in the County. The proposed Standards are a practical and lawful exercise of the County's regulatory authority, and a critical component of ensuring that BESS and ESMS projects deliver their intended benefits without compromising safety or reliability. By adopting these minimum standards, the County will proactively mitigate the leading causes of BESS and ESMS failures, enhance public safety, and align with California's broader policy goals for clean energy and sustainable development.

We appreciate the opportunity to provide input on this important matter and welcome further discussions to support the County in implementing these recommendations.

Sincerely,



Christina Caro
Tom Enslow

CMC:acp

COUNTY OF SAN DIEGO BOARD OF SUPERVISORS
REGULAR MEETING AGENDA

TUESDAY, FEBRUARY 10, 2026, 9:00 AM AND WEDNESDAY, FEBRUARY 11, 2026, 9:00 AM
COUNTY ADMINISTRATION CENTER,
BOARD CHAMBER, ROOM 310
1600 PACIFIC HIGHWAY, SAN DIEGO, CA 92101

GENERAL LEGISLATIVE SESSION
TUESDAY, FEBRUARY 10, 2026, 9:00 AM

Order Of Business

- A. Roll Call
- B. Invocation
- C. Pledge of Allegiance
- D. Presentation or Announcement of Proclamations and Awards
- E. Non-Agenda Public Communication: Individuals can address the Board on topics within its jurisdiction that are not on the agenda. According to the Board's Rules of Procedure, each person may speak at only one Non-Agenda Public Communication session per meeting. Speakers can choose to speak during either the General Legislative or Land Use Legislative Session.
- F. Approval of the Statement of Proceedings/Minutes for the sessions of January 27, 2026 and January 28, 2026; and, minutes for concurrent Special District meeting of the San Diego County Fire Protection District of December 9, 2025.
- G. Consent Agenda
- H. Discussion Items
- I. Board Member Committee Updates. This is an opportunity for Members of the Board to provide informational updates on their committee assignments. No action may be taken.
- J. Recess to Wednesday, February 11, 2026, at 9:00 AM for the Land Use Legislative Session

Viewing Agenda Materials

All documents and attachments related to agenda items are available for public viewing. You can access them online at www.sandiegocounty.gov/cob, or in person at the Clerk of the Board's Office, located at 1600 Pacific Highway, Room 402, San Diego, CA 92101. The Board Meeting calendar is online at www.sandiegocounty.gov/bos/calendar.html.

How to Speak at a Board Meeting

If you would like to speak at the meeting, either in person or by phone, you can sign up by visiting <https://PublicComment.SanDiegoCounty.gov>. On the form, you will be asked to enter your name and choose how you would like to participate, either by attending in person or calling in virtually. If you choose to speak by phone, please make sure to enter a valid phone number so we can identify you when you call. You will also be asked to select the agenda item or items you wish to comment on and indicate whether you are in favor, opposed, or neutral. Once you submit the form, you will receive a confirmation email. If you need the information on the website in another language, simply click the Translate button at the top of the page and select your preferred language.

You can also submit a comment in writing at www.sandiegocounty.gov/ecomment, via email to PublicComment@sdcounty.ca.gov, or by mail to 1600 Pacific Highway, Room 402, San Diego, CA 92101.

Board Actions and Recommendations

The Board of Supervisors may take action on any item listed on the meeting agenda. While each agenda item includes recommendations, these are only suggestions and do not limit what the Board may ultimately decide. Individuals should not assume that the Board will follow the recommendations.

Accessibility Accommodations

The County is committed to making Board meetings accessible to everyone. If you need accommodations to participate, please contact us at least three days before the meeting by calling 619-531-5434 (TTY 619-531-4803) or emailing PublicComment@sdcounty.ca.gov. If you need a sign language interpreter, you can call 619-531-4908. Assistive Listening Devices are also available from the Clerk of the Board's Office in Room 402.

Language Interpretation Services

The County of San Diego wants everyone to be able to participate in Board meetings—no matter what language they speak. A Spanish interpreter is available at every Board of Supervisors meeting to assist those who wish to speak to the Board in Spanish. If you need interpretation in another language, please request it at least 72 hours before the meeting by calling 619-531-5434 or emailing PublicComment@sdcounty.ca.gov.

In addition, the County can provide space in the Board Chamber's Observation Balcony for those providing or receiving interpretation, supporting the use of personal devices like phones or headsets, or help connect you to outside interpretation services for other languages. Please contact the Clerk of the Board in advance so we can make the necessary arrangements. Interpretation must not interrupt the meeting, in accordance with Government Code Section 54957.95.

Levine Act Notice – Campaign Contribution Disclosures

Under the Levine Act (Government Code § 84308), anyone involved in a proceeding before the Board, such as for a license, permit, or other entitlement for use, must disclose any campaign contributions over \$500 made to Board Members within the past 12 months. This includes contributions made by the parties themselves or their agents. The disclosure must include the name of the contributor and recipient, the amount, and the date of the contribution. Disclosures can be made orally during the meeting or in writing on the request-to-speak form.

Board of Supervisors' Agenda Items

CONSENT AGENDA

All agenda items listed under this section are considered to be routine and will be acted upon with one motion. There will be no separate discussion of these items unless a member of the Board of Supervisors or the Chief Administrative Officer so requests, in which event, the item will be considered separately in its normal sequence.

Category	#	Subject
Public Safety	1.	AUTHORIZE A-87 EXEMPTION TO COMPETITIVE PROCUREMENT TO APPROVE PUBLIC DEFENDER CONTRACT WITH PARTNERS FOR JUSTICE AND ESTABLISH APPROPRIATIONS (4 VOTES)
	2.	ADOPTING ORDINANCES RATIFYING THE 2026 CONSOLIDATED FIRE CODE, REPEALING THE 2023 CONSOLIDATED FIRE CODE, ADOPTING AND RATIFYING THE 2026 WILDLAND-URBAN INTERFACE CODE, AND RELATED CEQA EXEMPTION (2/10/26 - FIRST READING - 3/3/26 - SECOND READING UNLESS ORDINANCE IS MODIFIED ON SECOND READING (RELATES TO SAN DIEGO COUNTY FIRE PROTECTION DISTRICT ITEM FP01)
	3.	ADMINISTRATIVE ITEM: SECOND CONSIDERATION AND ADOPTION OF ORDINANCE: SHERIFF - ADOPT AN ORDINANCE ADDING CHAPTER 9 TO TITLE 2, DIVISION 1; AMENDING TITLE 2, DIVISION 1, CHAPTER 1 AND AMENDING TITLE 2, DIVISION 1, CHAPTER 3 OF THE SAN DIEGO COUNTY CODE OF REGULATORY ORDINANCES RELATING TO LICENSE REQUIRED FROM THE SHERIFF, FOR-HIRE VEHICLE DRIVERS, AND TAXICABS AND TAXICAB OPERATORS (01/28/2026 - FIRST READING; 02/10/2026 - SECOND READING UNLESS ORDINANCE IS MODIFIED ON SECOND READING)
Health and Human Services	4.	APPOINTMENT OF SAN DIEGO COUNTY CHILD CARE AND DEVELOPMENT PLANNING COUNCIL (CCDPC) MEMBERS
Financial and General Government	5.	APPOINTMENTS OF BOARD MEMBERS TO BOARDS, COMMISSIONS AND COMMITTEES
	6.	ADOPT AN ORDINANCE TO ADD CHAPTER 28 TO DIVISION 1 OF TITLE 2 LICENSES, BUSINESS REGULATIONS, AND BUSINESS TAXES OF THE COUNTY CODE OF REGULATORY ORDINANCES RELATING TO IMPROVING SAFETY AND LABOR STANDARDS IN COUNTY PARKS (2/10/26 - FIRST READING; 3/3/26 - SECOND READING UNLESS ORDINANCE IS MODIFIED ON SECOND READING)

7. 2025 ESCHEATMENT OF UNCLAIMED PROPERTY TAX REFUND MONEY IN COUNTY TRUST FUNDS (PROPERTY TAX)
8. 2025 ESCHEATMENT OF UNCLAIMED MONEY IN COUNTY TRUST FUNDS
9. GENERAL SERVICES - APPROVE FIFTH AMENDMENT TO LEASE AGREEMENT FOR THE REGIONAL AUTO THEFT TASK FORCE
10. ADOPTION OF RESOLUTION OF INTENTION TO SELL SURPLUS REAL PROPERTY - 11.71 ACRES ON COTTONWOOD AVENUE, SANTEE - COUNTY PARCEL NUMBER 2013-0091-A; AUTHORIZATION TO CONDUCT PUBLIC AUCTION AT COUNTY OPERATIONS CENTER; DIRECTION TO COMMIT USE OF EXCESS REVENUE FROM POTENTIAL FUTURE EDGEMOOR PROPERTY SALE TO FACILITATE DEVELOPMENT OF MISSING MIDDLE HOUSING; AND APPROVAL OF CEQA EXEMPTION (4 VOTES)
11. ADMINISTRATIVE ITEM:
SECOND CONSIDERATION AND ADOPTION OF ORDINANCE:
AN ORDINANCE ESTABLISHING COMPENSATION (1/28/2026- FIRST READING; 2/10/2026- SECOND READING, UNLESS THE ORDINANCE IS MODIFIED ON SECOND READING)
12. APPOINTMENTS: VARIOUS
13. COMMUNICATIONS RECEIVED

DISCUSSION ITEMS

Category	#	Subject
Financial and General Government	14.	FIGHTING THE RISING COST OF LIVING BY OPPOSING NEW TAXES
	15.	PRESENTATION OF A SEMIQUINCENTENNIAL (250TH ANNIVERSARY) CELEBRATION OF THE UNITED STATES DECLARATION OF INDEPENDENCE AT WATERFRONT PARK
	16.	EMPLOYER AND EMPLOYEE RETIREMENT CONTRIBUTION RATES FOR FISCAL YEAR 2026-27
	<u>17.</u>	<u>CLOSED SESSION</u>

1. SUBJECT: AUTHORIZE A-87 EXEMPTION TO COMPETITIVE PROCUREMENT TO APPROVE PUBLIC DEFENDER CONTRACT WITH PARTNERS FOR JUSTICE AND ESTABLISH APPROPRIATIONS (DISTRICTS: ALL)

OVERVIEW

On February 28, 2023 (6), the San Diego County Board (Board) authorized a single source exemption to competitive procurement for Public Defender (PD) to contract with Partners for Justice (PFJ) for juvenile client advocate services for one year and three option years. The contract was executed effective July 1, 2023 and embedded PFJ client advocates within the Primary Public Defender’s Juvenile Justice Unit. On average, approximately 39 juvenile clients and their families receive client advocate services. Services include assistance with long-term housing resources, education support and school enrollment, job training or placement services, benefits enrollment, medical advocacy, access to in-custody services, release planning and more. Due to the positive results this program has achieved in the juvenile justice division, PD requests to expand these services to its adult division, which will lead to better outcomes for clients and their families and increase attorney efficiency.

Prior to the implementation of the program with PFJ, deputy public defenders performed these tasks themselves. Since the implementation of PFJ’s client advocate services to PD’s juvenile justice division, attorney time spent on support services for clients has decreased, allowing them to focus their time more exclusively on legal work. Today’s request includes authorizing the Director of Purchasing and Contracting to enter into a one-year contract with PFJ beginning March 1, 2026 through June 30, 2027 with three option years through 2030 to provide three client advocates to assist PD’s adult client program and establish appropriations of \$400,000 from the Opioid Settlement Fund to the Office of the Public Defender, Services & Supplies.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

1. In accordance with Board Policy A-87 Procedure A.3, approve and authorize the Director of the Department of Purchasing and Contracting to enter into negotiations with Partners for Justice and, subject to successful negotiations and a determination of a fair and reasonable price, award contract for three client advocates to assist PD’s adult client program for up to one year and three option periods through 2030 and an additional six months if needed, and to amend the contract as needed to reflect changes to requirements and funding.
2. Establish appropriations of \$400,000 from the Opioid Settlement Fund to the Office of the Public Defender, Services & Supplies, for contract for client advocate services and associated technical assistance March 1, 2026 through June 30, 2027. **(4 VOTES)**

EQUITY IMPACT STATEMENT

Today’s action seeks to reduce disparities across the criminal justice system by helping fulfill the needs of the Public Defender’s (PD) indigent clients. A snapshot of the multitude and diverse array of needs experienced by San Diegans that cycle through the legal system is presented in a July 2025 report by the San Diego Association of Governments (SANDAG) titled “2024 Adult

Arrestee Drug Use in the San Diego Region”. Per the report, of the adult arrestees surveyed, three in four arrestees tested positive for a substance, including one in two that tested positive for methamphetamine. Additionally, a third of the arrestees reported a mental health diagnosis, and over two-thirds reported having experience with being unhoused.

Client advocates will support PD clients by connecting clients to a network of local services, community organizations, and civil attorneys. They will work with PD’s attorneys to reduce jail time and improve case outcomes, disrupting the cycle of poverty and incarceration. By addressing the non-legal challenges that clients face (i.e. poverty, unemployment, mental health needs, etc.), Client advocates offer the opportunity to restore and heal individuals, engage them with the community, help prevent repeat offenses, and promote justice, both within the legal system and without.

SUSTAINABILITY IMPACT STATEMENT

Part of the role of client advocates is to connect clients with resources to help them sustain themselves during and after experiences with the criminal justice system, as well as to reintegrate themselves back into the community. These resources include community-based social services related to addiction, physical and mental health, housing, employment, education, and finance as well as civil, family, and immigration legal resources. Client advocates will help lift barriers to supportive services caused by limited public awareness and lack of social connectivity.

This program would support the County's Sustainability Goal of providing just and equitable access to County services. Additionally, the program would be an investment in a chronically underserved community and would assist in building the resilience of a vulnerable population. Strengthening resilience is a key sustainability commitment in the County’s current Operational Plan.

FISCAL IMPACT

If approved, this request will establish appropriations totaling \$400,000 in Public Defender for contracted client advocate services and associated technical assistance from March 1, 2026 through June 30, 2027. Current year costs, estimated at \$100,000 have not been budgeted in the Fiscal Year (FY) 2025-26 Operational Plan. Remaining appropriations (\$300,000) to cover option years costs for contracted services from July 1, 2026 through June 30, 2027 will be included in the FY 2026-28 CAO Recommended Operational Plan in the Public Defender. The funding source will be the Opioid Settlement Fund. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

2. SUBJECT: ADOPTING ORDINANCES RATIFYING THE 2026 CONSOLIDATED FIRE CODE, REPEALING THE 2023 CONSOLIDATED FIRE CODE, ADOPTING AND RATIFYING THE 2026 WILDLAND-URBAN INTERFACE CODE, AND RELATED CEQA EXEMPTION (2/10/26 - FIRST READING - 3/3/26 - SECOND READING UNLESS ORDINANCE IS MODIFIED ON SECOND READING (DISTRICTS: 1, 2, AND 5))

OVERVIEW

Every three years, the State of California repeals, revises, and republishes the California Building Code Standards Code in its entirety, and in doing so, adopts and publishes amendments to the California Fire Code. Counties and fire protection districts may adopt the California Fire Code by reference or establish more restrictive standards if such changes are reasonably necessary because of local climatic, geological, or topographical conditions.

On March 14, 2023 (1), the County of San Diego (County) enacted the previous version of the California Fire Code into the County’s Code of Regulatory Ordinances (Consolidated Fire Code). As part of today’s proposed actions, the Board of Supervisors would repeal the existing Consolidated Fire Code and reenact the updated Consolidated Fire Code, and the San Diego County Fire Protection District (SDCFPD) Board of Directors would adopt the updated 2025 California Fire Code with modifications, which shall be enforced as the 2026 San Diego County Consolidated Fire Code (2026 Consolidated Fire Code) by SDCFPD. In addition, as part of today’s proposed actions, the SDCFPD Board of Directors would adopt the new 2025 California Wildland-Urban Interface (WUI) Code with modifications, which shall be enforced as the 2026 San Diego County WUI Code (2026 WUI Code) by SDCFPD. The WUI Code includes chapters related to the home hardening from the previous building code and defensible space from the previous fire code.

There are 11 fire districts and one water district that provide fire services within the geographical area of the county, including the SDCFPD. In addition to the modifications by the SDCFPD, the 2026 Consolidated Fire Code and the 2026 WUI Code contain modifications that other districts deem necessary because of local conditions. There are 19 changes to the 2026 Consolidated Fire Code and 22 to the 2026 WUI Code proposed by the fire marshals of the unincorporated fire districts. The fire code standards in today’s proposed ordinances increase protection of structures and property against wildfire-related damage and loss through progressive requirements that go beyond those required by the State. Key changes include increasing the sizes of water tanks that are used as an alternative to fire hydrants, increasing the size of uninhabitable residential structures that require sprinkler systems, adding home hardening requirements, and adding defensible space enforcement requirements on one acre or less vacant properties.

The 10 other local fire districts and the one water district have already adopted the 2026 Consolidated Fire Code and the 2026 WUI Code. To take effect within the fire districts, the 2026 Consolidated Fire Code and the 2026 WUI Code must be either ratified, modified, or denied by the Board of Supervisors. One of today’s actions is for the Board of Supervisors to ratify the 2026 Consolidated Fire Code and the 2026 WUI Code.

Today’s request is for the Board of Directors of the SDCFPD and the Board of Supervisors to find this project exempt from CEQA and for the Board of Directors of the SDCFPD to consider and approve ordinances adopting the 2026 Consolidated Fire Code and the 2026 WUI Code for

applicability within the SDCFPD. Today's action would also repeal the Consolidated Fire Code that was adopted in 2023 and request the County Board of Supervisors to consider and approve ordinances adopting the 2026 Consolidated Fire Code and the 2026 WUI Code to the San Diego County Code of Regulatory Ordinances and to approve ordinances ratifying the 2026 Consolidated Fire Code and the 2026 WUI Code, so they are effective within all local fire districts. If the ordinances for the Board of Directors and the Board of Supervisors are approved today, they will be scheduled for adoption on March 3, 2026. If any of the proposed ordinances are altered on March 3, 2026, then on that date a subsequent meeting date will be selected for adoption.

Acting as the Board of Directors of the San Diego County Fire Protection District:

RECOMMENDATION(S)

EXECUTIVE DIRECTOR OF THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT

On February 10, 2026:

1. Find that the proposed actions are not projects as defined in the Public Resources Code section 21065 and California Environmental Quality Act (CEQA) Guidelines section 15378, or alternatively, exempt from CEQA pursuant to CEQA Guidelines section 15061(b)(3) for the reasons stated in the Notice of Exemption.
2. Find that the San Diego County Fire Protection Districts' amendments to the California Building Standards are reasonably necessary because of local climatic, geological, or topographical, or topographical conditions, pursuant to Health and Safety Code section 13869.7.
3. Approve the introduction of the Ordinance (first reading), titled:
AN ORDINANCE REPEALING AND REENACTING THE CONSOLIDATED FIRE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT
4. Approve the introduction of the Ordinance (first reading), titled:
AN ORDINANCE ENACTING THE 2026 WILDLAND-URBAN INTERFACE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT

If, on February 10, 2026, the Board of Directors takes the actions recommended in Items 1-4 above, then, on March 3, 2026:

1. Consider and adopt (second reading unless ordinance is modified on second reading):
AN ORDINANCE REPEALING AND REENACTING THE CONSOLIDATED FIRE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT
2. If adopted, direct the Clerk of the Board to provide a certified copy of the adopted Ordinance Repealing and Reenacting the Consolidated Fire Code for the San Diego County Fire Protection District.
3. Consider and adopt (second reading unless ordinance is modified on second reading):
AN ORDINANCE ENACTING THE 2026 WILDLAND-URBAN INTERFACE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT

4. If adopted, direct the Clerk of the Board to provide a certified copy of the adopted Ordinance Enacting the 2026 Wildland-Urban Interface Code for the San Diego County Fire Protection District.

Acting as the Board of Supervisors of the County of San Diego:

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

On February 10, 2026:

1. Find that the proposed actions are not projects as defined in the Public Resources Code section 21065 and California Environmental Quality Act (CEQA) Guidelines section 15378, or alternatively, exempt from CEQA pursuant to CEQA Guidelines section 15061(b)(3) for the reasons stated in the Notice of Exemption.
2. Approve the introduction of the Ordinance (first reading):
AN ORDINANCE RATIFYING THE 2026 CONSOLIDATED FIRE CODE FOR THE UNINCORPORATED SAN DIEGO COUNTY FIRE DISTRICTS
3. Approve the introduction of the Ordinance (first reading):
AN ORDINANCE REPEALING AND REENACTING THE CONSOLIDATED FIRE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT
4. Approve the introduction of the Ordinance (first reading):
AN ORDINANCE ENACTING THE 2026 WILDLAND-URBAN INTERFACE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT
5. Approve the introduction of the Ordinance (first reading):
AN ORDINANCE RATIFYING THE 2026 WILDLAND-URBAN INTERFACE CODE FOR THE UNINCORPORATED SAN DIEGO COUNTY FIRE DISTRICTS

If, on February 10, 2026, the Board of Supervisors takes the actions recommended in 1-5 above then, on March 3, 2026:

1. Consider and adopt (second reading unless ordinance is modified on second reading):
AN ORDINANCE RATIFYING THE 2026 CONSOLIDATED FIRE CODE FOR THE UNINCORPORATED SAN DIEGO COUNTY FIRE DISTRICTS
2. Consider and adopt (second reading unless ordinance is modified on second reading):
AN ORDINANCE REPEALING AND REENACTING THE CONSOLIDATED FIRE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT
3. Consider and adopt (second reading unless ordinance is modified on second reading):
AN ORDINANCE ENACTING THE 2026 WILDLAND-URBAN INTERFACE CODE FOR THE SAN DIEGO COUNTY FIRE PROTECTION DISTRICT
4. Consider and adopt (second reading unless ordinance is modified on second reading):
AN ORDINANCE RATIFYING THE 2026 WILDLAND-URBAN INTERFACE CODE FOR THE UNINCORPORATED SAN DIEGO COUNTY FIRE DISTRICTS

5. Upon adoption, direct the Clerk of the Board to provide a certified copy of the adopted Ordinances Ratifying the 2026 Consolidated Fire Code and the 2026 Wildland-Urban Interface Code for the unincorporated San Diego County Fire Districts and the associated findings to the California Department of Housing and Community Development, pursuant to California Health and Safety Code section 13869.7(c).

EQUITY IMPACT STATEMENT

One aspect of fire prevention is ensuring fire codes are updated and clear to provide specific direction to customers and residents. The proposed actions will provide better direction, ensuring good customer service and equitable safety for all the residents of our county. In addition, the San Diego County Fire Protection District (SDCFPD) recognizes the systematic impacts that inequitable policies may create for residents of the County of San Diego. More than 80% of the SDCFPD's jurisdictional area qualifies as a disadvantaged unincorporated community, based on a 2020 San Diego Local Agency Formation Commission (LAFCO) report on funding, administrative, and performance of the former County Service Area No. 135 (now SDCFPD). Residents in the SDCFPD are more likely to be older, experience negative health conditions, and live in isolated communities that are further away from a fire response. By strengthening the fire code in our region, these actions enhance the outcomes for some of the region's most vulnerable residents.

SUSTAINABILITY IMPACT STATEMENT

The proposed actions related to the 2026 Consolidated Fire Code and the 2026 Wildland Urban Interface (2026 WUI) Code will contribute to the County of San Diego's sustainability goal to protect the health and well-being of everyone in the region and advocating for environmental justice for communities that have been disproportionately impacted. Partnering with the other local unincorporated fire districts to provide one fire code will support the safety and sustainability of communities by ensuring that codes are imposed consistently to build, enhance, and maintain resiliency.

FISCAL IMPACT

There is no fiscal impact associated with these recommendations. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

(RELATES TO SAN DIEGO COUNTY FIRE PROTECTION DISTRICT ITEM FP01)

3. **SUBJECT: ADMINISTRATIVE ITEM:
SECOND CONSIDERATION AND ADOPTION OF ORDINANCE:
SHERIFF - ADOPT AN ORDINANCE ADDING CHAPTER 9 TO TITLE 2, DIVISION 1; AMENDING TITLE 2, DIVISION 1, CHAPTER 1 AND AMENDING TITLE 2, DIVISION 1, CHAPTER 3 OF THE SAN DIEGO COUNTY CODE OF REGULATORY ORDINANCES RELATING TO LICENSE REQUIRED FROM THE SHERIFF, FOR-HIRE VEHICLE DRIVERS, AND TAXICABS AND TAXICAB OPERATORS (01/28/2026 - First Reading; 02/10/2026 - Second reading unless ordinance is modified on second reading) (DISTRICTS: ALL)**

OVERVIEW

On January 28, 2026 (02), the Board of Supervisors took action to further consider and adopt the Ordinance on February 10, 2026.

The San Diego County Sheriff’s Office (Sheriff’s Office) License Division currently issues all taxicab drivers in the unincorporated San Diego County as provided by Title 2, Division 1, Chapter 3 of the San Diego County Code.

In 1997, at the request of the Metropolitan Transit Development Board, the Sheriff’s Office agreed to assume the responsibility for licensing drivers of jitneys, low-speed vehicles, nonemergency medical vehicles, charters, and sightseeing vehicles in addition to taxicabs. San Diego Metropolitan Transit System (MTS) Ordinance No. 11 was accordingly revised, and the Sheriff’s Office began issuing all non-taxicab for-hire driver ID cards pursuant to Ordinance No. 11. However, the San Diego County Code was never revised to formalize this transfer of responsibilities. The Sheriff’s Office began licensing for-hire vehicle drivers, except for taxicabs, in accordance with Ordinance No. 11 while MTS maintained responsibility for the denial, revocation or appeal. Due to a lack of authority to receive criminal history information and stated due process concerns, MTS is not processing revocations, denials or appeals for the for-hire drivers, raising significant public safety concerns.

Today’s item requests that the San Diego County Board of Supervisors review and approve the introduction of an ordinance relating to for-hire vehicle drivers. The ordinance would formalize the transfer of responsibility that took place in 1997 and provide the Sheriff’s Office with the authority to deny, suspend, revoke, and process appeals for all for-hire vehicle drivers. This ensures that for-hire vehicle drivers are complying with eligibility requirements designed to protect the safety of both passengers and the public. The ordinance would also amend the County’s taxicab regulations for consistency with the new for-hire vehicle driver ID card regulations. The ordinance will be introduced on January 28, 2026, and, if approved, it will be scheduled for adoption on February 10, 2026.

RECOMMENDATION(S)

SHERIFF

Consider and adopt the For-Hire Vehicle Driver Ordinance:

AN ORDINANCE ADDING CHAPTER 9 TO TITLE 2, DIVISION 1; AMENDING TITLE 2, DIVISION 1, CHAPTER 1 AND AMENDING TITLE 2, DIVISION 1, CHAPTER 3 OF THE SAN DIEGO COUNTY CODE OF REGULATORY ORDINANCES RELATING TO LICENSE REQUIRED FROM THE SHERIFF, FOR-HIRE VEHICLE DRIVERS, AND TAXICABS AND TAXICAB OPERATORS.

EQUITY IMPACT STATEMENT

The proposed Ordinance will enhance public safety by ensuring that all for-hire drivers are subject to clear and consistent standards regarding the issuance, suspension, or denial of their licenses. Adopting the proposed Ordinance would ensure that all for-hire drivers licensed by the Sheriff's Office have the right to appeal in the case of a denial or revocation.

SUSTAINABILITY IMPACT STATEMENT

The proposed action supports the County of San Diego's Sustainability Goal #2 of providing just and equitable access to County services to promote equity, transparency, and community trust.

FISCAL IMPACT

There is no fiscal impact associated with today's request to review and approve the amended Ordinance. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

4. SUBJECT: APPOINTMENT OF SAN DIEGO COUNTY CHILD CARE AND DEVELOPMENT PLANNING COUNCIL (CCDPC) MEMBERS (DISTRICT: ALL)

OVERVIEW

The San Diego County Child Care and Development Planning Council (CCDPC) is advisory to the San Diego County Board of Supervisors (Board) and the San Diego County Superintendent of Schools to advise the State on local child care and needs. The San Diego County CCDPC is a statutory body for all counties per Assembly Bill (AB) 131 and Welfare and Institutions Code, Child Care and Development Services Act [10207 - 10490], and Chapter 31 Local Planning Councils [10480 - 10487]. The San Diego County Superintendent of Schools approved the San Diego County CCDPC Membership Roster on November 21, 2025.

Today's action requests the Board appoint nine new members and reappoint eight members to the San Diego County CCDPC and approve the San Diego County CCDPC Membership Roster for 2026.

Today's action supports the County of San Diego vision of a just, sustainable, and resilient future for all, specifically those communities and populations in San Diego County that have been historically left behind, as well as our ongoing commitment to the regional *Live Well San Diego* vision of healthy, safe, and thriving communities. This will be accomplished by continuing services that assist San Diego County families with their diverse child care needs and improving access to quality child care and early education programs, which promote a healthy, safe and thriving region.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

1. Appoint nine new members to the San Diego County Child Care and Development Planning Council (CCDPC) to serve a two-year term, set to expire December 31, 2027.

2. Reappoint eight members to the San Diego County CCDPC, whose term ended on December 31, 2025, to serve another two-year term, set to expire December 31, 2027.
3. Approve the San Diego County CCDPC Membership Roster for 2026 and authorize the Clerk of the Board to certify the membership composition as required by the California Department of Social Services (Attachment A and B).

EQUITY IMPACT STATEMENT

The San Diego County Child Care and Development Planning Council (CCDPC) membership roster recommendations are made with a good faith effort to appoint members ensuring that the ethnic, racial and geographic composition of the San Diego County CCDPC is reflective of the population of the county. The membership list for the 2026 year will be comprised of 16% Black or African American, 44% Hispanic, 4% Asian or Pacific Islander, 56% White (non-Hispanic), and 4% Native American. This demographic closely resembles the demographics of San Diego County (Attachment B).

The San Diego County CCDPC assesses the child care and child development needs of San Diego County children and develops a Child Care Plan to address those needs. The Child Care Plan provides recommendations gathered through community engagement solicited during San Diego County CCDPC meetings. San Diego County CCDPC members conduct outreach in the community with a focus on engaging areas of the community with the highest need. Outreach is conducted throughout the year with a strong emphasis done in March through May of each year to solicit new members.

SUSTAINABILITY IMPACT STATEMENT

Today's proposed actions support the County of San Diego Sustainability Goal #2 to provide just and equitable access by providing the building blocks to create a more equitable, accountable, accessible, and affordable child care system that meets the needs of San Diego County families.

FISCAL IMPACT

There is no fiscal impact associated with these recommendations. There will be no change in net General Fund costs and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

5. **SUBJECT: APPOINTMENTS OF BOARD MEMBERS TO BOARDS, COMMISSIONS AND COMMITTEES (DISTRICTS: ALL)**

OVERVIEW

The Board of Supervisors annually appoints Board Members to the boards, commissions and committees listed in Attachment A.

RECOMMENDATION(S)
CHAIR TERRA LAWSON-REMER

1. Appoint members of the Board of Supervisors to boards, commissions and committees as proposed in Attachment A.
2. Appoint Matthew Parr, Director, Office of Economic Development and Government Affairs, as the second alternate member on the Urban Counties of California.

EQUITY IMPACT STATEMENT

Annually, the Board of Supervisors must appoint members of the Board to serve on boards, commissions, and committees. This ensures that the County has a voice on regional boards and commissions for opportunities to maximize resources to benefit the region.

SUSTAINABILITY IMPACT STATEMENT

The proposed appointments allow stakeholders to plan for community engagement and identify meaningful ways to continually seek input to foster inclusive and sustainable communities.

FISCAL IMPACT

There is no fiscal impact associated with these recommendations. There will be no change to net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

There is no business impact associated with this action.

6. **SUBJECT: ADOPT AN ORDINANCE TO ADD CHAPTER 28 TO DIVISION 1 OF TITLE 2 LICENSES, BUSINESS REGULATIONS, AND BUSINESS TAXES OF THE COUNTY CODE OF REGULATORY ORDINANCES RELATING TO IMPROVING SAFETY AND LABOR STANDARDS IN COUNTY PARKS (2/10/26 - FIRST READING; 3/3/26 - SECOND READING UNLESS ORDINANCE IS MODIFIED ON SECOND READING) (DISTRICTS: ALL)**

OVERVIEW

On November 3, 2021 (05), the County of San Diego (County) Board of Supervisors (Board) adopted a Resolution requiring the County Department of Parks and Recreation (DPR) through existing reservation and event agreements, to ensure that all entertainment vendors at DPR facilities have completed the Entertainment Technician Certification Program (ETCP) and a 10-hour Occupational Safety and Health Administration (OSHA) safety awareness course or equivalent. Subsequently, on October 21, 2025 (21), the Board directed the Chief Administrative Officer (CAO) to explore the feasibility of establishing a local labor enforcement mechanism for higher impact events held on County-owned and leased park property, to support implementation and compliance with Board adopted labor standards, including minimum wage requirements, and to return to the Board within 120 days with a draft ordinance, through the Office of Labor Standards and Enforcement (OLSE).

This action is in response to a national trend in which large-scale commercial events held on public property generate economic activity but may also present heightened safety and labor compliance risks. Temporary and subcontracted workers, stagehands, and production crews often work in fast-paced environments with limited oversight. Without local enforcement, violations such as unpaid wages and unsafe conditions can go unaddressed, risking the safety and well-being of workers and attendees.

In partnership with organizations supporting entertainment professionals, OLSE identified measures the County could implement to ensure events held on County-owned and leased park property reflect the County's values, promote safe workplaces, and ensure responsible management of public spaces. The proposed ordinance establishes enforceable labor standards for high-impact events, including a \$25 minimum hourly wage for entertainment workers with annual cost-of-living adjustments based on state minimum wage increases. These requirements apply to technicians, stagehands, and other event-based workers engaged directly through subcontractors to perform setup, operation, or teardown of production elements such as staging, lighting, and sound as set forth by California State Labor Code Division 5, Part 14, Section 9251.

This ordinance would also authorize OLSE to investigate complaints, issue penalties, and promote compliance through education and outreach. Additionally, it establishes a dedicated staff position to ensure consistent enforcement and coordination between OLSE and DPR.

Today's request is for the Board to approve the introduction of an ordinance adding Chapter 28 to Division 1 of Title 2 Licenses, Business Regulations, and Business Taxes of the County Code of Regulatory Ordinances, establishing clear safety and labor standards for entertainment and live events on County-owned and leased park property. If approved, the ordinance will be scheduled for adoption on March 03, 2026. If the proposed ordinance is modified on February 10, 2026, then, on that date, a subsequent meeting date will be selected for the ordinance's adoption.

RECOMMENDATION(S)
CHIEF ADMINISTRATIVE OFFICER

On February 10, 2026:

1. Consider the recommendation to approve the introduction of the Ordinance (first reading):

ADOPT AN ORDINANCE TO ADD CHAPTER 28 TO DIVISION 1 OF TITLE 2 LICENSES, BUSINESS REGULATIONS, AND BUSINESS TAXES OF THE COUNTY CODE OF REGULATORY ORDINANCES RELATING TO IMPROVING SAFETY AND LABOR STANDARDS IN COUNTY PARKS

If, on February 10, 2026, the Board takes action as recommended on item #1 above, then on March 03, 2026:

1. Consider and adopt the Ordinance (second reading):

ADOPT AN ORDINANCE TO ADD CHAPTER 28 TO DIVISION 1 OF TITLE 2 LICENSES, BUSINESS REGULATIONS, AND BUSINESS TAXES OF THE COUNTY CODE OF REGULATORY ORDINANCES RELATING TO IMPROVING SAFETY AND LABOR STANDARDS IN COUNTY PARKS

2. If the Board acts on Recommendation #1 above:
 - a. Refer to Fiscal Year (FY) 2026-27 budget deliberations the establishment of appropriations of \$165,000 in the Chief Administrative Office, Office of Labor Standards and Enforcement for one staff year (1.0 FTE) for administering and enforcing safety and labor standards at County-owned and leased park facilities based on General Purpose Revenue. Active enforcement of the ordinance and program implementation will be contingent upon the successful addition of the position in the Operational Plan.
3. Direct the Chief Administrative Officer to report back on the status of the Improving Safety and Labor Standards in County Parks Program established in the Office of Labor Standards and Enforcement, including development of regulations on how funds will be collected if penalties are administered.

EQUITY IMPACT STATEMENT

Improving safety and labor standards in County parks directly advances the County's commitment to equity, inclusion, and worker well-being. By setting clear minimum labor standards and requiring compliance with established safety practices, the proposed ordinance promotes equitable treatment across all event workers, regardless of employment status or employer type.

SUSTAINABILITY IMPACT STATEMENT

This action strengthens the long-term sustainability of the region's live events ecosystem by promoting responsible labor practices, community safety, and operational integrity within County-owned and leased park property. Sustainable governance is not only environmental but also includes ensuring that economic systems and workplaces function safely and equitably over time. By embedding fair labor standards and safety requirements into the administration of County-owned and leased park property, the County helps create a self-sustaining model in which event organizers, vendors, and workers all benefit from predictable expectations and reduced risks. These measures contribute to a stable, skilled, and safety-conscious workforce, decreasing turnover and supporting the resilience of both the local events industry and the broader community that depends on it.

FISCAL IMPACT

There is no fiscal impact for FY 2025-26. If Recommendation 2a is approved on March 3, 2026, there will be ongoing costs and revenue of approximately \$165,000 that will be referred to FY 2026-27 budget deliberations in the Chief Administrative Office, Office of Labor Standards and Enforcement for one staff year for administering and enforcing safety and labor standards at County-owned and leased park facilities based on General Purpose Revenue. For the Department of Parks and Recreation, any decrease in special events could provide less revenue and potentially impact park operations and programming.

BUSINESS IMPACT STATEMENT

Today's action establishes equitable standards for entertainment event vendors, and discourages unfair competition from low-road employers by setting clear and consistent safety and labor standards for County-owned and leased park properties. These standards promote responsible business practices that protect workers and ensure that all contractors operate under equitable conditions. By establishing a more predictable and transparent operating environment, the

ordinance helps retain more of the economic impact generated from events on County-owned and leased park property within the local economy, supporting good jobs, fair wages, and a skilled entertainment workforce. In doing so, the County strengthens the regional events industry, fosters high-quality vendor performance, and reinforces its role as a fair and accountable public partner to the business community.

7. SUBJECT: 2025 ESCHEATMENT OF UNCLAIMED PROPERTY TAX REFUND MONEY IN COUNTY TRUST FUNDS (PROPERTY TAX) (DISTRICTS: ALL)

OVERVIEW

This is a request to approve the escheatment of unclaimed property tax refunds pursuant to section 5102 of the California Revenue and Taxation Code.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

Approve the escheatment of unclaimed property tax refunds and direct the Chief Administrative Officer through the Auditor and Controller to transfer \$313,012.66 from the Treasurer-Tax Collector trust funds and deposit in the County General Fund.

EQUITY IMPACT STATEMENT

The Treasurer-Tax Collector recognizes the systemic impacts that inequitable policies may create for residents of the County of San Diego. Impacts have historically included outcomes related to racial justice and issues of belonging that are reflected in the programs, services and resources allocated to communities. The Treasurer-Tax Collector has provided widespread public notice that these property tax refunds are available to claim by displaying a full list of items on its website for the past four years, and by placing display ads in local community news publications throughout the County as means to notify the public of the upcoming deadline to claim refunds before they are escheated. The notices and display ads utilize plain language and graphics to convey the message and action that is needed to claim a refund. Concurrent to these efforts staff perform extensive research and make attempts to contact the rightful owner of the refund and encourage a claim be submitted. It is anticipated that these actions have a positive impact on groups including Black, Indigenous, People of Color (BIPOC), women, people with disabilities, immigrants, youth, and the LGBTQ+ community

SUSTAINABILITY IMPACT STATEMENT

The proposed actions to escheat unclaimed refunds and return the revenue to the County of San Diego's (County) General Fund are appropriate as they support the County's Strategic Initiative of Sustainability to align the County's available resources with services to maintain fiscal stability and ensure long-term solvency. The proposed actions to escheat revenue is in alignment with the County's Sustainability Goal of providing just and equitable access as the process to claim refunds is widely accessible to all claimants.

FISCAL IMPACT

If approved, this request will result in \$313,012.66 of unanticipated revenue to the General Fund. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

8. SUBJECT: 2025 ESCHEATMENT OF UNCLAIMED MONEY IN COUNTY TRUST FUNDS (DISTRICTS: ALL)

OVERVIEW

This is a request to approve the escheatment of specified unclaimed funds pursuant to California Government Code sections 50050-50057 and Penal Code sections 1420-1422. Public notice has been given by the Treasurer-Tax Collector that 1) the amount of \$278,465.43 was deposited in Trust Funds in the Treasury of San Diego, 2) was not the property of the County of San Diego (County), 3) has remained unclaimed for the requisite years, and 4) will become property of the local agency effective October 7, 2025, if no claim is received prior to that date. The final claim period ended on October 6, 2025.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

1. Direct the Chief Administrative Officer to transfer total of \$242,802.54 from County Trust Funds from identified County Departments and deposit it as revenue in the County's General Fund.
2. Direct the Chief Administrative Officer through the Office of Revenue and Recovery to transfer a total of \$35,662.89 from its Trust Funds and deposit it as revenue in the Office of Revenue and Recovery's Victim Services Fund

EQUITY IMPACT STATEMENT

The Treasurer-Tax Collector recognizes the systemic impacts that inequitable policies may create for residents of the County of San Diego. Impacts have historically included outcomes related to racial justice and issues of belonging that are reflected in the programs, services and resources allocated to communities. County departments submit a list of unclaimed monies in their possession to the Treasurer-Tax Collector for inclusion in the Treasurer-Tax Collection escheatment noticing and advertising activity. The Treasurer-Tax Collector provides widespread public notice that these unclaimed monies are available to claim by displaying a full list of items on the Treasurer-Tax Collector website, and by placing display ads in local community news publications throughout the County as means to notify the public of the upcoming deadline to claim the monies before they are escheated. The notices and display ads utilize "plain language" and graphics to convey the message and action that is needed to make a claim. Concurrent to these efforts staff perform extensive research and make attempts to contact the rightful owner of the money and encourage a claim to be submitted. It is anticipated that these actions have a positive impact on groups to include Black, Indigenous, People of Color (BIPOC), women, people with disabilities, immigrants, youth, and the LGBTQ+ community.

SUSTAINABILITY IMPACT STATEMENT

The proposed actions to escheat unclaimed refunds and return the revenue to the County of San Diego (County) General Fund are appropriate as they support the County's Strategic Initiative of Sustainability and the Goal of Economy, to align the County's available resources with services

to maintain fiscal stability and ensure long-term solvency. The proposed actions to escheat revenue are also in alignment with the County's Sustainability Goal of providing just and equitable access as the process to claim refunds is widely accessible to all claimants.

FISCAL IMPACT

If approved, this request will result in \$242,802.54 of unanticipated revenue to be realized by the County of San Diego's General Fund and \$35,662.89 by the Office of Revenue and Recovery Victim Services Fund. There will be no change in net General Fund costs and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

9. SUBJECT: GENERAL SERVICES - APPROVE FIFTH AMENDMENT TO LEASE AGREEMENT FOR THE REGIONAL AUTO THEFT TASK FORCE (DISTRICT: 2)

OVERVIEW

The San Diego County Regional Auto Theft Task Force (RATT) is a multi-agency task force that investigates and prosecutes vehicle theft in the San Diego Region. The County of San Diego (County) is the financial administrator for the task force. On June 2, 1992 (20), the Board of Supervisors (Board) approved the initial lease for office space for RATT.

On August 6, 2019 (17), the Board authorized a site search for a new location as the current facility no longer met the operational requirements of RATT. A space validation conducted by the Department of General Services (DGS) supported a need of up to 21,500 square feet. DGS negotiated a short-term lease extension to allow RATT time to search for space that better suited its programmatic needs. The current facility no longer meets the operational requirements necessary to accommodate the current staffing needs. The County identified a facility owned by the current lessor's affiliate that meets RATT's requirements. The initial lease expired on April 30, 2025, and is currently on holdover, which has allowed RATT to continue its occupancy on a month-to-month basis while a relocation amendment was negotiated.

Staff from DGS have negotiated a fifth amendment to the lease agreement that will relocate RATT to a new facility and extend the term by ten years, with one five-year option to further extend the term. The proposed amendment also includes an expansion of 718 square feet. Today's request is for Board approval of the fifth amendment to the lease agreement, which will allow RATT to relocate to a new facility.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

1. Find the proposed lease for the San Diego County Regional Auto Theft Task Force is exempt from the California Environmental Quality Act (CEQA) Guidelines pursuant to State CEQA Guidelines Section 15301.
2. Approve and authorize the Director, Department of General Services, to execute the proposed lease amendment for the new premises located in San Diego.

EQUITY IMPACT STATEMENT

The San Diego County Regional Auto Theft Task Force supports the community in its current location. Extending the term of the lease would benefit the community by continuing to provide resources. A larger facility increases the availability of adequate programs and resources ensuring the community has equitable access to law enforcement resources.

SUSTAINABILITY IMPACT STATEMENT

Implementing effective sustainability objectives is crucial to ensuring safe and healthy communities and contributing to the overall success of the region. The approval of this lease amendment supports the County's Strategic Initiative of Sustainability to ensure the capability to respond to immediate needs for individuals, families, and the region.

FISCAL IMPACT

Funds for this request are included in the Fiscal Year 2025-26 Operational Plan for San Diego County District Attorney (DA). If approved, this request will result in estimated costs and revenue of approximately \$94,500 in Fiscal Year 2025-26 based on an estimated amendment commencement of April 1, 2026. Fiscal Year 2026-27 costs are estimated at \$381,308, which includes a 3.5% rent adjustment to go into effect April 1, 2027. Funds for the remaining contract term and for each option year (if exercised) will be included in future years' operational plans for DA. The funding source is fees collected pursuant to California Vehicle Code Section 9250.14. There will be no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

- 10. SUBJECT: ADOPTION OF RESOLUTION OF INTENTION TO SELL SURPLUS REAL PROPERTY - 11.71 ACRES ON COTTONWOOD AVENUE, SANTEE - COUNTY PARCEL NUMBER 2013-0091-A; AUTHORIZATION TO CONDUCT PUBLIC AUCTION AT COUNTY OPERATIONS CENTER; DIRECTION TO COMMIT USE OF EXCESS REVENUE FROM POTENTIAL FUTURE EDGEMOOR PROPERTY SALE TO FACILITATE DEVELOPMENT OF MISSING MIDDLE HOUSING; AND APPROVAL OF CEQA EXEMPTION (DISTRICT: 2)**

OVERVIEW

On December 3, 2013 (18), the Board of Supervisors (Board) declared County of San Diego (County) Parcel Number 2013-0091-A (Property 1) surplus to County needs. Property 1 is further identified as Assessor's Parcel Number (APN) 381-051-17 and consists of approximately 11.71 acres of vacant land located immediately south of the Edgemoor Skilled Nursing Facility. In November 2016, the County issued a Notice of Availability (NOA) per State of California Surplus Land Act (SLA) and attempted to sell the property twice to repay the Edgemoor Development Fund, per Board Policy F-38, *Edgemoor Property Development* (Board Policy F-38).

On August 1, 2024, the County issued the NOA as required by SLA to local public entities, as defined by Section 50079 of the Health and Safety Code, that have jurisdiction over the surplus land. The NOA was also sent to California Housing Finance Agency Certified Housing

Sponsors, as defined by Section 50074 of the Health and Safety Code, that have notified the California Department of Housing and Community Development of their interest in surplus land for affordable housing development. In accordance with SLA, interested parties were given 60 days to respond to the NOA. The County did not receive interest from any public entities, but did receive proposals from three housing sponsors, and entered into a good faith negotiation period with the selected developer as required by SLA. However, the County and the selected developer could not agree on mutually satisfactory terms for the sale.

Today's request is for Board authority to take the actions necessary to sell Property 1 to the highest bidder in accordance with California Government Code Sections 25520 et seq. If the Board takes the actions recommended on February 10, 2026, then on March 20, 2026, the Director of General Services, or designee, will conduct the bid openings for the sale of Property 1, open sealed bids from bidders, open the floor for oral bids, select the highest responsible bidder, and return to the Board at a later date for the final acceptance of the selected bid and approval of the sale. As permitted by California Government Code Section 25527, if the winning bidder is represented by a licensed real estate broker, a commission equal to two percent of the sale price will be paid to the broker from the sale proceeds. In addition, as required by Section 54233 of the California Government Code, County will record a restrictive covenant against Property 1. This covenant will state if 10 or more residential units are developed on the property, then at least 15% of the total units shall be rented or sold at affordable housing cost or affordable rent to lower income households, as defined in Section 54233. The minimum bid for Property 1 is \$15,000,000, representing an as-is value based on an appraisal addendum dated August 23, 2025. Pursuant to Board Policy F-38, the net proceeds from the sale of the property will be deposited to the Edgemoor Development Fund.

RECOMMENDATION(S)
CHIEF ADMINISTRATIVE OFFICER

1. Find that the proposed actions are exempt from review under the California Environmental Quality Act (CEQA) pursuant to State CEQA Guidelines Section 15312 as it is the sale of surplus government property that is not located in an area of statewide, regional, or areawide concern identified in Section 15206(b)(4) of the State CEQA Guidelines.
2. Approve and adopt the Resolution entitled: RESOLUTION OF INTENTION TO SELL REAL PROPERTY AND NOTICE INVITING BIDS FOR REAL PROPERTY NUMBER 2013-0091-A. **(4 VOTES)**
3. Direct the Clerk of the Board of Supervisors (Board) to post the adopted Resolution and advertise the County's Notice of the Adoption of the Resolution of Intention to Sell Real Property Number 2013-0091-A in accordance with the Government Code Sections 25528 and 6063.
4. Authorize the Director, Department of General Services, or designee, to conduct the bid opening and select the highest responsible bidder for Real Property Number 2013-0091-A on March 20, 2026 and return to the Board for the final approval of the highest bidder.

5. Direct the Chief Administrative Officer to commit use of excess revenue from the potential future sale of a portion of the Edgemoor Remainder Parcel (APN 381-050-81) after payment of outstanding debt service to facilitate the development of Missing Middle housing in San Diego County and return to the Board to appropriate the excess revenue.

EQUITY IMPACT STATEMENT

Parcel Number 2013-0091-A (Property 1) is among 25 sites in the City of Santee (City) that were recently rezoned to reduce the residential density and could support the development of the moderate-income category of housing. It is anticipated that the approval of today's recommendations will increase housing production that meets the needs of the community in the City. As required by Surplus Land Act (SLA) Government Code Section 54222.5 and California Department of Housing and Community Development, the County will record a restrictive covenant against Property 1 at the time of sale, which states that if 10 or more residential units are developed on Property 1, then at least 15% of the total number of units developed on the property shall be sold or rented as affordable housing. The revenue resulting from the sale of Property 1 will be deposited to the Edgemoor Development Fund and used to support annual debt service for the Edgemoor Skilled Nursing Facility.

SUSTAINABILITY IMPACT STATEMENT

Today's proposed action contributes to the County of San Diego's Sustainability Goal No. 1 to engage the community to partner and participate in decisions that impact communities and Goal No. 2 to provide just and equitable access to develop land for housing needs.

FISCAL IMPACT

Funds for this request are included in the Fiscal Year 2025-26 Operational Plan in the Department of General Services (DGS). If approved, today's requests will result in costs and revenue of \$220,000 in Fiscal Year (FY) 2025-26, which includes DGS staff costs of \$60,000 for sale of Property 1, ongoing homeless encampment cleanup efforts of \$60,000 on the Edgemoor properties, \$80,000 for pre-planning efforts such as survey work, appraisal and staff time to prepare for a future Board request to declare a portion of the Remainder Parcel surplus, and \$20,000 to support the identification of how excess revenue can be used to develop of Missing Middle housing and report back. The funding source is Edgemoor Development Fund revenue.

If the sale of Parcel Number 2013-0091-A (Property 1) is completed, this will result in revenue of \$15,000,000 anticipated in FY 2026-27. Pursuant to Board Policy F-38, *Edgemoor Property Development* (Board Policy F-38), the net proceeds from the sale of the property will be deposited to the Edgemoor Development Fund to support the annual debt service for the Edgemoor Skilled Nursing Facility. Per Board Policy F-38 revenue generated in excess of debt service payments, can be used to pay for costs associated with management, maintenance or marketing of the Edgemoor property. Based on Recommendation 5, alternative uses to fund Missing Middle housing will be identified. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

11. SUBJECT: AN ORDINANCE ESTABLISHING COMPENSATION (1/28/2026- FIRST READING; 2/10/2026- SECOND READING, UNLESS THE ORDINANCE IS MODIFIED ON SECOND READING) (DISTRICTS: ALL)

OVERVIEW

On January 28, 2026 (11), the Board of Supervisors took action to further consider and adopt the Ordinance on February 10, 2026.

The Compensation Ordinance, enacted by the Board of Supervisors, establishes procedures for compensating County of San Diego employees. The Department of Human Resources recommends updates based on organizational needs to attract and retain a skilled, adaptable, and diverse workforce. Today's proposed amendments support this goal.

Today's recommendations are for the Board to approve the introduction of the amendments to the Compensation Ordinance (first reading). If the Board takes action as recommended, then on February 10, 2026, staff recommends the Board adopt the ordinance (second reading). If the proposed ordinance is altered on February 10, 2026, then on that date a subsequent meeting date will be selected for the adoption of the ordinances.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

Approve the adoption of the Ordinances (second reading):

AN ORDINANCE ESTABLISHING COMPENSATION

If the proposed ordinance(s) are altered on February 10, 2026, then on that date a subsequent meeting date will be selected for adoption of the ordinance(s).

EQUITY IMPACT STATEMENT

The Department of Human Resources is committed to ensuring equity in classification and compensation. Today's recommended amendments to the Compensation Ordinance will help the County of San Diego attract, retain, and support a skilled, adaptable, and diverse workforce, enabling the delivery of efficient, high-quality services to residents and visitors.

SUSTAINABILITY IMPACT STATEMENT

The proposed amendments to the Compensation Ordinance support the County of San Diego's Sustainability Goals by promoting sustainable economic growth through just and equitable wages and benefits.

FISCAL IMPACT

There is no fiscal impact associated with these recommendations. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

12. SUBJECT: APPOINTMENTS: VARIOUS (DISTRICTS: ALL)

OVERVIEW

These appointments are in accordance with applicable Board Policy A-74, “Citizen Participation in County Boards, Commissions and Committees,” Board Policy A-77, “Appointments to Fill Vacancies and Cancellation of Election where Insufficient Nominations Filed Prior to Uniform District Election and Citizen Planning Group Election,” and Board Policy I-1, “Planning and Sponsor Group Policies and Procedures.”

RECOMMENDATION(S)

SUPERVISOR JIM DESMOND

Appoint Christi Knight to the COMMUNITY ACTION PARTNERSHIP ADMINISTERING BOARD, Seat 5, for the term to expire January 4, 2027.

Appoint Brian Morales to the PARKS ADVISORY COMMITTEE, SAN DIEGO COUNTY, Seat 9, to complete the unexpired term, set to expire January 4, 2027.

Appoint Francesca Harris to the RAINBOW COMMUNITY PLANNING GROUP, Seat 5, for a term to expire January 8, 2029.

Appoint Stuart Kuhn to the WARNER SPRINGS COMMUNITY SPONSOR GROUP, Seat 1, to complete the unexpired term, set to expire January 8, 2029.

Appoint Dorothy Willis to the WARNER SPRINGS COMMUNITY SPONSOR GROUP, Seat 9, to complete the unexpired term, set to expire on January 8, 2029.

EQUITY IMPACT STATEMENT

County government includes standing and special citizen boards, commissions, committees, and task forces formed to advise the Board of Supervisors and County staff on issues and policy and to serve as links to the community. Boards, commissions, and committees provide an inter-relationship between the residents and the government of the County. The nominations in this Board Letter enable the County of San Diego to provide individual residents the opportunity to impart valuable insight and input into the operation of the government.

SUSTAINABILITY IMPACT STATEMENT

The County of San Diego has over one hundred boards, commissions, committees, and task forces that serve as voice in the County government. Advisory bodies are an essential role in resident engagement that allow citizens to participate on issues relating to the welfare and quality of life in the County. They are fundamental to the County of San Diego’s ability to navigate complex and dynamic policy challenges, are a conduit to the County Bureaucracy, and a broker to community voice. This board letter supports the County of San Diego Sustainability Goal No.1 by “encourage[ing] people and diverse stakeholders to partner and participate in decisions that impact their lives and communities.”

FISCAL IMPACT

N/A

BUSINESS IMPACT STATEMENT

N/A

13. SUBJECT: COMMUNICATIONS RECEIVED (DISTRICTS: ALL)

OVERVIEW

Board Policy A-72, Board of Supervisors Agenda and Related Process, authorizes the Clerk of the Board to prepare a Communications Received for Board of Supervisors' Official Records. Routine informational reports, which need to be brought to the attention of the Board of Supervisors yet not requiring action, are listed on this document. Communications Received documents are on file in the Office of the Clerk of the Board.

RECOMMENDATION(S)

CHIEF ADMINISTRATIVE OFFICER

Note and file.

EQUITY IMPACT STATEMENT

N/A

SUSTAINABILITY STATEMENT

This board letter is a list of documents received by the Clerk of the Board of Supervisors and/or Board of Supervisors from other entities, other county departments, the public, and internal documents presented to the Clerk of the Board of Supervisors or the Board of Supervisors. This contributes to the overall sustainability of the county by engaging the community in meaningful ways and promote an environment that provides equitable access opportunities for public engagement.

FISCAL IMPACT

N/A

BUSINESS IMPACT STATEMENT

N/A

14. SUBJECT: FIGHTING THE RISING COST OF LIVING BY OPPOSING NEW TAXES (DISTRICTS: ALL)

OVERVIEW

This item was continued from the January 28, 2026 General Legislative and Land Use Legislative Session.

San Diego County is one of the most desirable places to live in the country with its temperate weather, vibrant economy, and beautiful landscape. 3.3 million people are lucky to call San Diego County their home. However, many are being priced out by the high cost of living. Years of mismanagement by the State of California, coupled with structural economic issues like the housing shortage, are exacerbating the affordability crisis. Californians pay some of the highest

taxes in the country: state income and payroll taxes, sales taxes, property taxes, gas taxes, school bonds, vehicle registration, and more. Working and middle-class families, young professionals, seniors, and small businesses are being crushed by the cost of living and tremendous taxes they pay.

The County of San Diego (County) has collected increasing, record amounts in property taxes year after year. This was reflected in the County's largest budget ever being adopted, totaling \$8.63 billion for Fiscal Year 2025-26 (FY). The County does not have a revenue problem, and residents already pay exorbitant taxes. The County should actively oppose new and unnecessary taxes.

The Documentary Transfer Tax (DTT), also known as the property transfer tax, is a tax on all real estate transactions. It applies a tax of \$0.55 per \$500 on the sale price of property under state law. This is typically a line item for real estate sales. For example, a property that sells for \$1 million would have a DTT of \$1,100. This default rate of \$0.55 is set by state law. It can be raised by a city or county through a ballot measure. Cities and counties that have raised this tax have seen disastrous effects on their real estate markets and local economies. Raising the DTT typically results in a sharp drop in real estate transactions, reduced development and construction, and below expected revenue from the tax. Proposals to raise the statewide default rate from \$0.55 to \$30.55 would result in a 5,455% increase of the DTT. If the tax rate was increased 5,455%, the \$1,100 one would pay on a \$1 million home would suddenly become \$61,100. This would dramatically increase the price of not just single-family homes, but office space, commercial space, and multi-family housing, which could have unintended consequences on our local economy.

A proposal has also been made to change state laws to allow individual counties to collect payroll taxes. Currently, counties cannot levy and collect payroll taxes. Payroll taxes are paid by the employee and employer to the state and federal governments. Payroll taxes are a massive overhead cost for businesses and raising these costs will make it harder for businesses not only to hire new employees, but also to retain their existing workforce. Larger businesses may reconsider operating in San Diego County, and small businesses will have harder time growing and staying afloat.

The County of San Diego should oppose new and unnecessary taxes. The County has a healthy revenue source that has continuously increased. Today's action directs the Chief Administrative Officer to add to the Legislative Program opposition to legislation that will increase the DTT and the ability for counties to levy and collect payroll taxes.

RECOMMENDATION(S)
SUPERVISOR JIM DESMOND

1. Direct the Chief Administrative Officer to include in the Board's Legislative Program opposition to legislation that will change state law that would increase the current Documentary Transfer Tax of fifty-five cents (\$0.55) for each five hundred dollars (\$500).
2. Direct the Chief Administrative Officer to include in the Board's Legislative Program opposition to legislation that will change state law to allow counties to levy and collect payroll taxes.

EQUITY IMPACT STATEMENT

N/A

SUSTAINABILITY IMPACT STATEMENT

N/A

FISCAL IMPACT

There is no fiscal impact associated with this action. There will be no change in net General Fund cost and no additional staff years

BUSINESS IMPACT STATEMENT

N/A

15. **SUBJECT: PRESENTATION OF A SEMIQUINCENTENNIAL (250TH ANNIVERSARY) CELEBRATION OF THE UNITED STATES DECLARATION OF INDEPENDENCE AT WATERFRONT PARK (DISTRICTS: ALL)**

OVERVIEW

San Diego County, the second largest county in California, is home to one of the most diverse and civically engaged populations in the country and holds a unique place in the nation's history. The county also has the largest concentration of military personnel in the world who share with the rest of our constituents a deep and enduring connection to the principles of democracy, service, and equality that underpin the United States Declaration of Independence. As the nation approaches the Semiquincentennial or 250th anniversary of the Declaration of Independence, the County of San Diego (County) is uniquely positioned to serve as a regional leader in commemorating this historic milestone.

Today's action requests Board authorization to hold a public Semiquincentennial Celebration on July 4, 2026 at Waterfront Park to commemorate the 250th anniversary of the United States Declaration of Independence. The proposed event would include the use of projection mapping displays on the County Administrative Center and authorize vendor participation to support event programming, public engagement, and community activation. Waterfront Park's central location and accessibility make it an ideal venue to host a large-scale, inclusive celebration that reflects the County's historical significance, military presence, and commitment to civic participation.

The proposed celebration also presents a significant opportunity to collaborate with community partners and Downtown San Diego stakeholders to enhance the event's reach, impact, and economic benefit. Potential sponsorships and partnerships may include, but are not limited to, ACE Parking, San Diego Metropolitan Transit System, San Diego Padres and Ballpark Events, Petco Park concessions and vendors, USS Midway Museum, Downtown San Diego Partnership, Gaslamp Quarter Association, Little Italy Association of San Diego, Petco Park concert and event entertainment companies, and the San Diego Tourism Authority. These collaborations would support strengthening ties between the County and the broader downtown business and cultural community.

Approval of this request will allow the County to commemorate a defining moment in the nation's history through an event that honors San Diego County's role as a center of military service, civic pride, and community partnership, while creating opportunities for public engagement, local business participation, and regional collaboration.

RECOMMENDATION(S)

SUPERVISOR JOEL ANDERSON AND SUPERVISOR JIM DESMOND

1. Direct the Chief Administrative Officer (CAO) to take the necessary actions to facilitate and support the planning and implementation of a Semiquincentennial (250th Anniversary) Celebration of the United States Declaration of Independence at Waterfront Park, including coordination of site use, approval of projection mapping displays, and authorization of vendor participation in support of the event.
2. Direct the CAO to foster partnerships and actively pursue sponsorships and collaborative opportunities with, and accept donations from, public, private, and community stakeholders, including downtown San Diego organizations, to support the planning, programming, and execution of the Semi Quincentennial (250th Anniversary) Celebration at Waterfront Park and to enhance public awareness, engagement, and participation in the event.

EQUITY IMPACT STATEMENT

The Semiquincentennial Celebration at Waterfront Park is designed to be inclusive and accessible for all San Diego County residents by ensuring free public admission, multilingual materials, and ADA-compliant facilities. The event will actively engage small businesses and vendors to promote economic equity, while programming will reflect the diverse cultural contributions that shape our nation's history.

SUSTAINABILITY IMPACT STATEMENT

N/A

FISCAL IMPACT

Funds for the actions requested to collaborate and plan for a Semiquincentennial (250th Anniversary) Celebration of the United States Declaration of Independence at Waterfront Park are partially included in the Fiscal Year (FY) 2025-26 Operational Plan based on existing staff time in the Department of Parks and Recreation and Department of General Services funded by existing General Purpose Revenue and Charges for Services to support planning for the event. There will be no change in net General Fund cost and no additional staff years.

Funds to support direct costs of the event, including vendors, equipment, and supplies, are not included in the FY 2025-26 Operational Plan and will depend upon availability of sponsorships and collaborative opportunities. At this time, there is no funding source budgeted to support direct event costs and the event would not proceed without financial support from sponsorships or reallocation of existing funding. Staff would return to the Board for any necessary actions to accept sponsorships and/or appropriate identified funding as needed. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

The County of San Diego (County) has a longstanding commitment to encouraging the participation of large and small businesses in County contracting opportunities and recognizes the vital role the local business community plays in supporting County initiatives. Approval of this request provides an opportunity to further advance these efforts by facilitating vendor participation at Waterfront Park, thereby expanding outreach and engagement while enhancing access to economic opportunities for local businesses.

16. SUBJECT: EMPLOYER AND EMPLOYEE RETIREMENT CONTRIBUTION RATES FOR FISCAL YEAR 2026-27 (DISTRICTS: ALL)

OVERVIEW

California Government Code Section 31454 requires the Board of Supervisors to adjust the rates of San Diego County's employer and employee retirement contributions based on recommendations of the San Diego County Employees Retirement Association (SDCERA) Board of Trustees (Retirement Board). The Retirement Board approved the employer and employee contribution rates recommended by its actuary, The Segal Group, Inc., for Fiscal Year (FY) 2026-27 on November 20, 2025.

While the employer contribution rates are different for Safety and General members, the aggregate employer rate (or weighted average rate) approved by the Retirement Board for FY 2026-27 is 38.00% of payroll, which is a decrease from the FY 2025-26 aggregate employer rate of 48.16%, as anticipated in our long term financial planning. The decrease in the employer contribution rate results most significantly from the effect of fully amortizing some of the retirement fund's Unfunded Actuarial Accrued Liability (UAAL) layers as well as from a larger than expected projected total payroll and changes in actuarial assumptions adopted by the Retirement Board, notably changes in demographic assumptions that effectively reduce cost.

The average employee (i.e. member) rate as a percentage of payroll decreased from 11.58% to 11.26%, primarily due to changes in active member demographics among retirement tiers and changes in actuarial assumptions.

Approval of today's recommendation would adopt employer and employee retirement contribution rates for inclusion in the Chief Administrative Officer Recommended Operational Plan (i.e. budget) for FY 2026-27.

RECOMMENDATION(S) CHIEF ADMINISTRATIVE OFFICER

Adopt the San Diego County employer and employee retirement contribution rates for Fiscal Year 2026-27 as recommended by the San Diego County Employees Retirement Association actuary and approved by the Retirement Board on November 20, 2025.

EQUITY IMPACT STATEMENT

Approval of this recommendation will implement the County of San Diego's contribution rates for the normal cost and Unfunded Actuarial Accrued Liability that will be funded in the Fiscal Year 2026-27 Operational Plan to meet the County's obligation to provide a defined benefit

pension plan for permanent employees. San Diego County Employees Retirement Association's retirement benefits support a broad community of diverse employees and retirees, providing long-term financial support well after active employment with the County concludes.

SUSTAINABILITY IMPACT STATEMENT

Benefits provided by a secure and stable retirement fund help ensure the County of San Diego can compete to attract and retain an appropriately sized, skilled and diverse workforce to design and implement policies, programs and services that ensure equitable and sustainable opportunities.

FISCAL IMPACT

If the recommendation to adopt the rates of employer retirement contributions is approved, the estimated total annual employer retirement contribution costs for the County of San Diego (County) and all participating employers will be approximately \$757.0 million for Fiscal Year (FY) 2026-27, a decrease of approximately \$139.3 million from the FY 2025-26 estimated total employer contribution.

The County is obligated to fund approximately 94% of the total annual employer retirement contribution, which is estimated at \$711.6 million in FY 2026-27, a decrease of approximately \$131.0 million from the County's share of estimated annual employer retirement contributions in the prior fiscal year, which is included in the County's long term financial planning. Other participating employers are obligated to make the remaining 6% of contributions to the San Diego County Employees Retirement Association (SDCERA). These employers include San Diego Superior Court, San Dieguito River Valley Joint Powers Authority, Local Agency Formation Commission and San Diego County Office of Education. The County's actual cost of retirement will differ from this estimate due to the application of the contribution rates to the County's actual biweekly payroll instead of the SDCERA actuary's assumed payroll. The funding source is a combination of program specific revenues and General Purpose Revenue. No additional staff years are required.

BUSINESS IMPACT STATEMENT

N/A

17. SUBJECT: CLOSED SESSION (DISTRICTS: ALL)

OVERVIEW

- A. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION
(Paragraph (1) of subdivision (d) of Section 54956.9)
Robert Martinez, et al. v. Tri-Group Construction and Development Inc., et al.;
San Diego Superior Court Case No.: 37-2023-00035689-CU-PA-CTL

- B. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION
(Paragraph (1) of subdivision (d) of Section 54956.9)
Daniel Garcia v. County of San Diego;
San Diego Superior Court Case No.: 37-2024-00021805-CU-PA-CTL

- C. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION
(Paragraph (1) of subdivision (d) of Section 54956.9)
Darryl Dunsmore, et al. v. County of San Diego, et al.; United States District Court,
Southern District Case No. 20-cv-00406-AJB-WVG

- D. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION
(Paragraph (1) of subdivision (d) of Section 54956.9)
Rowdy Pauu v. County of San Diego, et al.; United States District Court, Southern
District Case No. 23-cv-0961-TWR-SBC

- E. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION
(Paragraph (1) of subdivision (d) of Section 54956.9)
Whitney Antrim v. County of San Diego, et al.;
San Diego Superior Court, Case No.: 37-2023-00016017-CU-WT-CTL

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CPUC General Orders

General Orders translated into other languages

General Order	Effective Version	Description
22	22-B	Reports of accidents on railroads
24	24-C	Supersedes General Order 24-B (effective July 1, 1964). General Order 24-C became effective on August 27, 2012. Revisions to General Order 24 include: 1) the filing of a General Order 24 report on a quarterly instead of a monthly basis for the first year of the Financing Rule. Commencing in the second year, reports will be filed semi-annually (June and December); 2) revisions to the type of information provided in such reports; 3) elimination of requirement that a utility maintain a separate bank account to record money derived from the sale of securities, except where the Commission specifically designates what the proceeds can be used for, or in instances where the loan will be repaid by surcharge; and 4) an updated list of information required in the report, given the manner in which securities transactions are now recorded by utilities as required by other regulatory entities.
26	26-D	Clearances on railroads and street railroads as to side and overhead structures, parallel tracks and crossings
27	27-B	Filing and posting of railroad timetables and changes
28	28	Preservation of records of public utilities and common carriers
31	31	Railroad station bulletin boards and keeping passenger stations open
33	33-B	Construction, reconstruction, maintenance and operation of interlocking plants of railroads
36	36-E	Establishment or abolition of railroad agencies, sidings, spurs and other facilities, and curtailment of agency service
44	44	Refunding of notes
50	50-B	Filing of plans for construction of public utility dams
52	52	Construction and operation of power and communication lines for the prevention or mitigation of inductive interference
58	58-A	Standards of gas service
58	58-B	Standards of calorimetry for gaseous fuels
65	65-A	Filing of monthly financial and operating report

66	66-D	Procedures for obtaining information and records in the possession of the Commission and its employees and Commission policy orders thereon General Order 66-D was last amended by D.20-08-031 (see Attachment 1 for the latest version of the General Order) D.21-09-020 Correcting D.20-08-031 GO 66-D Click here for the Public Information Appeal Form
69	69-C	Easements on property of public utilities
72	72-B	Standard types of pavement construction at railroad grade crossings
75	75-D	Regulations Governing Standards for Warning Devices for At-Grade Highway-Rail Crossings
77	77-M	Filing of data on compensation, dues, donations, subscriptions, contributions and legal fees
80	80-C	Construction and filing of tariffs issued by highway common carriers, petroleum irregular route carriers, freight forwarders and express corporations (except air express companies and air freight forwarders). This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
84	84-H	Handling, and accounting for C.O.D. shipments by express corporations, freight forwarders, highway carriers, passenger stage corporations and household goods carriers. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
85	85-A	Issuance of free or reduced rate transportation and recording of passes. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
87	87	Filing and posting of time tables and changes therein by ferries and vessels
88	88-B	Rules for Altering Public Highway-Rail Crossings
94	94-B	Design, construction, operation, maintenance and inspection of gas holders and liquid hydrocarbon vessels
95	95	Overhead electric line construction. Revised on December 19, 2024, by Resolution ESRB-12 Check here for historical information.
96	96-B	Rules for filing and publishing tariffs for gas, electric, telephone, telegraph, water and heat utilities.
100	100-M	Protection against liability required for all highway carriers, freight forwarders, household goods carriers and exempt I.C.C. carriers
101	101-E	Protection against liability required for all passenger stage corporations
102	102-H	Bonding requirements in connection with subhauling or leasing of equipment from an employee. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
103	103-A	Water service including minimum standards for design and construction
104	104-A	Filing of annual reports by public utilities
105	105-A	The form and filing of tariffs issued by air transportation companies Repealed Pursuant to D.15-08-034, August 27, 2015
106	106	Chemical-type toilet facilities in railroad cabooses Repealed Pursuant to D.15-08-034, August 27, 2015
107	107-B	Privacy of telephone communications

108	108	Filing of railroad operating department rules
109	109	Tariff changes under special tariff docket for common carriers, air transportation companies, warehousemen and wharfingers
110	110	Radio communications in railroad operations
111	111-C	Protection against liability required for all vessel common carriers
112	112-F	Design, construction, testing, maintenance and operation of utility gas gathering, transmission and distribution piping systems.
113	113-B	Petitions for suspension and investigation of tariffs and schedules of common carriers, air transportation companies, warehousemen and wharfingers. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
114	114	Minimum safety, health and comfort requirements for railroad cabooses
115	115-G	Protection against liability required for all charter-party carriers of passengers
117	117-A	Construction and filing of tariffs issued by vessel carriers, pipeline corporations, toll bridge corporations, wharfingers and common carriers other than railroads and other than those governed by General Order No. 79 or No. 80-A
118	118-A	Construction, reconstruction and maintenance of walkways and control, of vegetation adjacent to railroad tracks.
119	119	Construction and filing of passenger tariffs issued by railroads
120	120-C	Protection against liability required for all commercial air operators and passenger air carriers. D84-09-088 (amends G.O. 120C). D84-12-001 (corrects clerical errors of D84-09-088). D85-03-038 (grants limited rehearing of D84-09-088)
121	121-A	Protection against liability required for all for-hire vessel operators
122	122-B	Public inspection of tariff schedules of common carriers. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
123	123-G	Filing of annual reports by permit carriers
124	124-C	Filing of annual reports by household goods carriers
125	125	Construction and filing of freight tariffs and classifications issued by railroads
126	126	Contents of first-aid kits provided by railroads
127	127	Maintenance and operation of automatic train control systems-rapid transit systems
128	128	Construction of underground electric supply and communication systems. Check here for historical information.
130	130	Leasing of motor vehicles
131	131-E	Permitting and construction of electric transmission and generation infrastructure. Adopted pursuant to D.25-01-055, superseding GO 131-D effective January 30, 2025.
132	132-A	Filing of rate quotation statements for transportation by common carriers for state, county or municipal governments. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.

133	133-D	Rules Governing Telecommunications Services (Service Quality)
135	135	The occupancy of public grade crossings by railroads
136	136-C	Rules and regulations for household goods carriers on cargo insurance, and loss and damage of used household goods and related property during course of transportation or storage in transit.
138	138	Connection of customer-provided equipment to telephone company systems
139	139-B	Handling of claims for loss or damage of property filed with express corporations, freight forwarders, highway carriers, household goods carriers and passenger stage corporations
142	142	Transportation and accessorial services (including storage-in-transit) of used household goods as described in MRT 4-B and performed by household goods carriers
143	143-B	Design, construction and operation of light rail transit systems (html format)
144	144-A	Denied boarding compensation for passengers holding confirmed reservations and meeting carriers' check-in requirements Repealed Pursuant to D.15-08-034, August 27, 2015
145	145	Railroad crossings to be classified exempt from the mandatory stop requirements of Section 22452 of the Vehicle Code
146	146-A	Rules implementing compensated intercorporate hauling exemption for highway carriers of property
147	147-D	Rules and regulations governing tariff filings by common carriers and contract filings by contract carriers under the transition period of the commission's deregulation program
148	148-A	Rules governing the processing, investigation, and disposition of overcharge or duplicate payment claims by common carriers
152	152-A	Rules Governing Private Line Alarm Service
153-A	153-A	Procedure for Administration of the Moore Universal Telephone Service Act. Revised Pursuant to D.25-11-008, Date of Issuance November 25, 2025.
154	154	Rules Governing the Organization and operation of Rate Bureaus and their Common Carrier Member Engaged in Collective Ratemaking. This GO has been preempted in part, or no longer applies to some carriers. Please refer to PUC Resolution TEA-2 and TEA-4 when interpreting it.
155	155-B	Rules Governing Issuance of Documentation and Collection of Charges by Highway Carriers
156	156	Rules Governing the Development of Programs to Increase Participation of Women, Minority, Disabled Veteran and Lesbian, Gay, Bisexual and Transgender (LGBT) Business Enterprises in Procurement of Contracts from Utilities as Required by Public Utilities Code Sections 8281-8286
157	157-E	Operations of charter-party carriers of passengers, including Transportation Network Companies (TNCs).
158	158-A	Operations of passenger stage corporations and the construction and filing of tariff and timetables
159	159-A	Construction of cellular radiotelephone facilities in California
160-A	160-A	Rules and regulation pertaining to private carriers of passengers, as defined by Public Utilities Code Section 4001, and organizations that provide transportation services incidental to operation of a youth camp which are required to register as private carriers pursuant to Public Utilities Code Section 5353(n)(2)(A).
161	161	Transportation of hazardous materials by rail
163	163-A	Regulations for the procurement of professional service firms. D0112010 adopts the revisions of G.O. 163.

164	164-F	Rules and Regulations Governing State Safety Oversight of Rail and other Fixed Guideway Systems – Adopted January 16, 2025. Effective January 16, 2025.
165	165	Inspection cycles for electric distribution facilities. D.97-03-070 (adopts G.O. 165). Revised 12/14/2017 (D.17-12-024). Check here for historical information.
166	166	Rulemaking for electric distribution facility standard setting D.98-07-097 (adopted G.O. 166). Revised: 5/20/21 (D.21-05-019). Utilities should refer to the most recent version of Guidelines for Notification of the CPUC Energy Division of Electric Emergencies for instructions regarding reporting of 6 levels of electric service outage emergencies.
167	167-C	Enforcement of Maintenance and Operation Standards for Electric Generating Facilities.
168	168	Consumer Bill of Rights Governing Telecommunications Services. Market Rules to Empower Telecommunications Consumers and to Prevent Fraud.
169	169	Implementing the Digital Infrastructure and Video Competition Act of 2006 (DIVCA)
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173	173	Regarding advice letter approval of certain transfers of interests in utility property pursuant to Public Utilities Code Section 851
174	174	Rules for Electric Utility Substations Check here for historical information.
175A	175-A	Rules and Regulations Governing Roadway Worker Protection provided by Rail Transit Agencies and Rail fixed Guideway Systems
176	176	Rules for Overhead 25 kV Railroad Electrification Systems for a High-Speed Rail System
177	177	Planning and construction review for certain gas system infrastructure

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PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

SAFETY AND ENFORCEMENT DIVISION
Electric Safety and Reliability Branch

Resolution -ESRB-13
March 13, 2025

RESOLUTION

**RESOLUTION ESRB-13 – Adopts General Order (GO) 167-C,
Enforcement of Maintenance and Operation Standards for Electric
Generating Facilities and Energy Storage Systems.**

OUTCOME: Adopts GO 167-C to: (1) implement the Senate Bill (SB) 1383 (Hueso, 2022) mandate to establish standards for the maintenance and operation of Energy Storage Systems; (2) apply SB 38 (Laird, 2023) requirements for Emergency Response and Emergency Action Plans to Energy Storage System Owners; (3) require Generating Asset Owners to coordinate with local authorities in developing their emergency plans; (4) establish Logbook Standards for Energy Storage Systems and Renewable Generating Assets, and revise Logbook Standards for each Generating Asset; (5) modify Maintenance and Operation Standards for Generating Assets; (6) add provisions to enhance safety and effectiveness of Generating Assets and Energy Storage Systems operation and maintenance; (7) update procedures, references, and definitions; (8) remove obsolete references and add relevant language; and (9) update applicable industry codes, standards, and organizations.

SAFETY CONSIDERATIONS: Will improve the safety and reliability of California electric generation facilities and energy storage facilities.

ESTIMATED COST: No significant cost.

SUMMARY

The California Public Utilities Commission’s (CPUC or Commission) GO 167 establishes standards for electric generating facilities to ensure that they are effectively maintained and operated to ensure safe and reliable service. The GO provides a method for enforcing General Duty Standards for Operations and Maintenance,¹ Generator

¹ R.02-11-039 established the General Duty Standards for temporary and limited purposes, until detailed Maintenance and Operations Standards were adopted by the Commission. See D.04-05-018, p. 23 and D.04-12-049, p. 29.

Maintenance Standards, Generator Operator Standards, Generator Logbook Standards, and other standards adopted pursuant to Pub. Util. Code § 761.3. The GO establishes a program for electric generating facility audits, inspections, and incident investigations. Other requirements established by the GO include reporting safety incidents, submitting periodic compliance filing updates and responding to SED staff information requests. The GO also provides a means to enforce the protocols for scheduling power plant outages of the California Independent System Operator and the other standards in GO 167.

This Resolution modifies GO 167 to comply with Senate Bill (SB) 1383 (Hueso, 2022) and to provide oversight over reporting requirements enacted in SB 38 (Laird, October 7, 2023). It also updates provisions and obsolete references in the GO, as well as addresses industry changes since the GO was initially adopted in 2004.

First, it establishes standards for the maintenance and operation of Energy Storage Systems (ESS), as required by SB 1383. Second, it modifies GO 167 to require the Emergency Response and Emergency Action Plans for each Energy Storage System Owner (ESSO). Because of their importance for public safety and to ensure consistency across all electricity generation technologies, the GO also requires Generating Asset Owners (GAO) to coordinate with local authorities in developing their own emergency plans. In addition, this Resolution establishes Logbook Standards for ESSs and Renewable Generating Assets, revises Logbook Standards for all other Generating Assets (GA), and makes other technical updates to the standards to improve safety, reliability, and effectiveness of operation and maintenance activities.

BACKGROUND

In response to the 2000-2001 Energy Crisis, the Legislature enacted Senate Bill (SB) X2-39 (Stats. 2002, Second Extraordinary Session, Chapter 19, Section 4, effective August 8, 2002), which among other things, added Pub. Util. Code § 761.3. Section 761.3 and directed the Commission to "implement and enforce standards... for the maintenance and operation of facilities for the generation of electric energy owned by an electrical corporation or located in the state to ensure their reliable operation."² In enacting SB X2-39 the Legislature declared that it is in the public interest "to ensure that electric generating facilities and power plants are effectively and appropriately maintained and efficiently operated."³

In 2002, the Commission opened Rulemaking (R.) 02-11-039 to implement Pub. Util. Code § 761.3. On May 7, 2004, the Commission adopted GO 167 in Decision

² See, Pub. Util. Code § 761.3(a) as amended by SBX2-39.

³ SB 39XX, §1(b).

(D.) 04-05-018, *Decision Adopting General Order Implementing and Enforcing Electric Generator General Duty Standards, Maintenance Standards and CAISO's Outage Coordination Protocol*.⁴ In D.04-05-018, the Commission noted "the GO will codify all standards and requirements applicable to facilities used for the generation of electric energy (pursuant to Pub. Util. Code § 761.3) and set forth the procedures to be used for implementation and enforcement."⁵

Several parties filed applications seeking rehearing of D.04-05-017 and D.04-05-018. In D.09-11-009, the Commission modified GO 167 to provide further clarity and denied the applications for rehearing.⁶ GO 167 has since been further modified over the years by Resolution No. E-4184,⁷ D.08-11-009,⁸ and ESRB-9 in 2021.⁹

EXPANSION OF RENEWABLE GENERATING ASSETS AND ENERGY STORAGE FACILITIES

Since the inception of GO 167 in 2004, there has been a significant increase in the number of renewable electric generation facilities in California. Much of this is attributable to the California's Renewables Portfolio Standard (RPS) program, which was established in 2002 by Senate Bill (SB) 1078 (Sher, 2002) with the initial requirement that 20 percent of electricity retail sales must be served by renewable resources by 2017. The program was accelerated in 2015 with SB 350 (de León, 2015) which mandated a 50 percent RPS by 2030. SB 350 includes interim annual RPS targets with three-year compliance periods and requires 65 percent of RPS procurement to be derived from long-term contracts of ten or more years. In 2018, SB 100 (de León, 2018) was signed into law, which again increases the RPS to 60 percent by 2030 and sets a target for all the state's electricity to come from carbon-free resources by 2045. Through SB 350's integrated resource plan process, all retail sellers of electricity are planning for and procuring new zero-carbon resources to reach California's carbon neutrality goal by 2045. A Joint Agency Report by the CPUC, California Energy Commission (CEC) and

⁴ The Commission concurrently issued D.04-05-017, *Interim Opinion Regarding Commission Implementation and Enforcement of Logbook Standards for Thermal Powerplants*. The requirements adopted in D.04-05-017 were subsequently included in GO 167.

⁵ D.04-05-018 at 3.

⁶ D.06-01-047, *Order Modifying and Denying Rehearing of Decisions 04-05-017 and 04-05-018*, issued January 26, 2006.

⁷ Resolution E-4184, *Adoption of Web-Based Emergency Reporting System for Utilities and Generation Asset Owners*, issued August 21, 2008.

⁸ D.08-11-009, *Final Decision Regarding Petition to Modify Decision 04-05-018 and General order 167*, issued November 7, 2008.

⁹ Resolution ESRB-9, *Modifies Citation Procedures for Violations Commission General Order 167, Enforcement of Maintenance and Operation Standards for Electric Generating Facilities*, issued June 24, 2021.

California Air Resources Board (CARB) recognizes that energy storage systems play a key role in meeting SB 100 goals by balancing intermittent renewable energy and managing grid reliability and stability via ancillary services and capacity.¹⁰ As defined in Pub. Util. Code § 2835, an energy storage system is a technology that is capable of absorbing energy, storing it for a period of time, and thereafter dispatching the energy. The Joint Agency Report also found that energy storage may also reduce the need for gas-fired thermal resources.¹¹

Statewide, ESS capacity has grown from 500 MWs in 2019 to 13,300 MWs in 2024.¹² Utility-scale ESS capacity reached 11,462 MWs in 2024,¹³ or 22 percent of California's peak demand.¹⁴ The state's projected need for ESS capacity is estimated at 52,000 MWs by 2045.¹⁵

Because the original GO 167 was written before the widespread adoption of renewable generation and energy storage facilities, a comprehensive review of the GO is needed for provisions related to the operation, maintenance, and safety oversight of non-thermal electric generation technology. Since 2017, however, the Electric Safety and Reliability Branch (ESRB) has been engaged in renewable generation oversight when it conducted its first audit of a renewable GA¹⁶ and issued an information request under Section 10.1 of the GO to notify renewable and thermal GAs of the CPUC Power Plant Outage Reporting (PPOR) requirement.¹⁷

Incidents at lithium-ion ESS facilities have caused fires, evacuation orders, and shelter-in-place orders for nearby residents; therefore, warranting an investigation by ESRB.

There have been a number of safety incidents at ESS facilities since 2021, including:

1. Vistra; Battery Energy Storage Facility, September 4, 2021
2. Vistra; Battery Energy Storage Facility, February 13, 2022
3. Terra-Gen; Valley Center Energy Storage Center, April 5, 2022

¹⁰ CEC, CPUC, CARB. 2021 SB 100 Joint Agency Report, p. 108.

¹¹ Ibid, p. 103.

¹² California Energy Commission, California Energy Storage System Survey, [California Energy Storage System Survey](#). Retrieved October 23, 2024.

¹³ Ibid.

¹⁴ CAISO highest peak demand of 52,061 MWs occurred on September 6, 2022. CAISO.

¹⁵ California Energy Commission. Retrieved October 23, 2024.

¹⁶ Topaz Solar Farm Audit conducted on October 23-26, 2017, March 14, 2018.

¹⁷ ESRB email to GAOs, "GO 167: Web-based Power Plant Outage Reporting (PPOR) to replace Outage Reporting Form SED-11-110 – GAO response requested by 10/25", October 17, 2017.

4. PG&E; Elkhorn Battery Energy Storage Facility, September 20, 2022
5. Terra-Gen; Valley Center Energy Storage Center, September 18, 2023
6. SDG&E; Kearny South Energy Storage, April 29, 2024
7. Convergent; Orange County Energy Storage 2, July 17, 2024
8. REV Renewables; Gateway Energy Storage Facility, May 15, 2024
9. SDG&E; Northeast Operations Center, Escondido, September 5, 2024
10. Vistra; Battery Energy Storage Facility, January 16, 2025.

There is currently no provision in GO 167 that requires ESSOs to report safety incidents such as injuries, fatalities, thermal runaways, fires, or other system failures to the CPUC. Regulatory oversight of ESS facilities is necessary because of the safety and reliability risks that can occur if ESS facilities are not properly operated and maintained.

In recognition of these changes and the need for safety oversight of these facilities, the Legislature enacted two bills that further modified Pub. Util. Code § 761.3: SB 1383 (stats. 2022, Ch. 725) and SB 38 (stats, 2023). SB 1383, which pertains to electric storage facilities (i.e., energy storage systems) directs the Commission to implement and enforce maintenance and operation standards for energy storage facilities owned by an electrical corporation or located in the state. SB 1383 also requires the Independent System Operator (ISO) to maintain records of storage facility outages and to provide those records to the Commission daily.

SB 38 requires each battery energy storage facility owned by an electrical corporation or located in the state to prepare an emergency response and emergency action plan that covers the premises of the battery energy storage facility and submit the plan to the county and city where the facility is located. It also requires the owner or operator of the facility to coordinate with the local emergency management agencies, unified program agencies, and local first response agencies.

JURISDICTION

The Commission's authority over the public safety aspects of regulated investor-owned utilities and other generators, including exempt wholesale generators (EWGs), is well-settled. In the most recent iteration of GO 167, the Commission affirmed its jurisdiction over the "maintenance and operation of electric generating facilities and power plants so as to maintain and protect the public health and safety of California residents and businesses, to ensure that electric generating facilities are effectively and appropriately maintained and efficiently operated, and to ensure electrical service reliability and

adequacy.”¹⁸ Currently, GO 167 includes language that specifically encompasses any “Generating Asset,” in Section 2.8, and any “Generating Asset Owner,” in Section 2.9, subject to certain exceptions.

The scope of the Commission’s jurisdiction under Pub. Util. Code § 761.3 was discussed in depth in D.04-05-017, D.04-05-018, and D.06-01-047 and need not be repeated here, other than to note that the Commission previously observed that: “[t]he breadth of the legislation extends our authority to many electric generators who have consistently maintained that they are not otherwise subject to our regulation.” (D.04-05-018 at 6.)

The citation authority of the Commission is established by Pub. Util. Code § 761.3, D.04-05-017, D.04-05-018, D.06-01-047, D.08-11-009. Resolution ESRB-9, issued on June 21, 2021, modified GO 167 to allow Commission staff to issue citations.

PROPOSED CHANGES

Implementation of SB 1383 for ESSs

The Electric Safety and Reliability Branch (ESRB) of the Commission’s Safety and Enforcement Division (SED) proposes updates to GO 167 to implement the provisions of SB 1383. Those updates include revising the definitions in Section 2 to include ESSs and ESSOs and applying the GO 167 standards to ESSs. Other sections were updated to expressly apply GO 167 to ESSs.

Emergency Response and Emergency Action Plans

Additionally, ESRB proposes to add oversight over ESSOs’ compliance with SB 38 by incorporating Section 2.4 and revising Operation Standard (OS) 20 to apply to ESSOs. Section 2.4 adds the SB 38 definition of Emergency Response and Action Plan to GO 167. OS 20 requires that an ESSO prepare an emergency response and emergency action plan for an ESS facility and submit the plan to the county and city where the facility is located. The owner or operator of the facility must coordinate with the local emergency management agencies, unified program agencies, and local first response agencies. It also proposes to require GAOs to coordinate with local authorities in developing emergency plans to increase coordination and consistency of safety requirements across all electric generators in the state.

Proposed Changes to GO 167 Impacting GAOs

While the Commission has previously modified GO 167 by issuing Resolution No. E-4184 and D.08-11-009 in 2008, and ESRB-9 in 2021, a comprehensive revision of the GO is necessary to update numerous provisions and obsolete references to more accurately reflect the current state of the electric industry. The proposed changes to GO

¹⁸ GO 167-B, Sections 1.0.

167 incorporate relevant technical language and update concepts and requirements to improve safety, reliability, and effectiveness of operation and maintenance activities. As an example, one proposed change incorporates modern operational concepts, such as requiring up-to-date software for cybersecurity purposes and trend analysis. The proposed changes to the GO also require that renewable GAs comply with Logbook Standards. Other proposed updates include removing obsolete references, such as: Appendix A: General Duty Standards for Operations and Maintenance, removing references to "Committee," removing initial deadlines that were specified in the original GO 167, and replacing the CAISO's Scheduling and Logging in California with the Outage Management System.

The changes include:

- **Required Compliance:** Applies the compliance requirement in Section 3 to ESSs, as appropriate, thus requiring ESS compliance with all standards and all sections of GO 167. This section clarifies the compliance requirements, based on the nameplate capacity of the facility as defined below:
 - Large facilities, GAs and ESSs, 50 MWs and greater in size, are subject to all requirements of GO 167.
 - Medium facilities, greater than 1 MW and less than 50 MWs, are subject to all requirements of GO 167 except for Sections 4, 5, 6, and 7: 4 ("GA and ESS Logbook Standards"), 5 ("Hydroelectric Logbook Standards"), 6 ("Maintenance Standards"), and 7 ("Operation Standards"). However, Medium facilities must follow prudent practices as required by GO 167, Sections 4.2, 5.2, 6.4, and 7.4.
 - Small facilities, smaller than one megawatt, are currently exempt from enforcement of the standards pursuant to GO 167. However, Small facilities are required to cooperate in any Commission or SED audit, inspection, and investigation by permitting Commission staff access to those GAs or ESSs and by providing Commission staff information (orally or written) or documents about the maintenance and operation of those GAs or ESSs, if requested by the Commission or SED.
- **Logbook Standards Verified Statement, and Updates:** Adds logbook requirements for ESSs and renewable facilities in Section 4 and Appendix A. Logbooks are an existing requirement for thermal and hydroelectric energy facilities as part of the Logbook Standards of GO 167. Additional edits to the thermal logbook requirements are included to incorporate relevant technical language and updated concepts, enhance operation and maintenance safety and

effectiveness, and added Exception 3 to allow maintenance activities to be tracked in work order management systems.

- **Maintenance Standards, Maintenance Plan Summary, Initial Certification, and Updates:** Revises the maintenance standards to apply to ESSs in Section 6 and Appendix C and revises the existing maintenance standards for GAs to incorporate relevant technical language, update concepts, and enhance maintenance safety and effectiveness. The standards are updated to enhance maintenance activities by applying industry best practices, lessons learned, and proven safety measures for the safety and reliability of both the GAs and ESSs. GAOs and ESSOs are also required to address corrosion (Maintenance Standard (MS) 13).
- **Operation Standards, Operation Plan Summary, Initial Certification, and Updates:** Revises the operation standards to apply to ESSs in Section 7 and Appendix D. This section also revises the existing operation standards for GAs to incorporate relevant technical language and concepts and enhance operations safety and effectiveness. The updates include: the annual review of procedures and documentation (OS 7), routine software updates for cybersecurity (OS 9), trend analysis from routine inspections (OS 13), and corrosion control (OS 27). OS 20 applies emergency response and emergency action plan and communication requirements to ESSOs and requires GAOs to coordinate with local emergency management agencies, unified program agencies, and local first response agencies in developing their emergency plans.
- **Safety-Related Incidents Reporting:** Requires reporting for ESSOs in Section 9, similar to that required for GAOs.
- **CAISO Outage Coordination Protocol:** Applies enforcement of Section 8 (CAISO Outage Coordination Protocol) to ESSs, requiring outage reports to the CAISO, as specified in Section 9.3.
- **Information Requests:** Applies Section 9 requirements to ESSs to respond to ESRB information requests and directives, which include submitting outage reports under the ESRB PPOR requirements, authorizations of release of information to the North American Electric Reliability Corporation (NERC) for historical and current GADS¹⁹ data as applicable and responding to ESRB data requests.
- **Audits, Inspections, and Investigations:** Applies Section 10 requiring an ESSO's cooperation during any audit, inspection, or investigation including providing

¹⁹ "Generating Availability Data System" or "GADS" means the data base system maintained by NERC which collects, records, and retrieves operating information for improving the performance of electric generating equipment.

records pertaining to the specifications, warranties, logbooks, operations, or maintenance of the ESS.

- **Violations, Commission Proceedings, and Sanctions:** Applies Sections 11 (Violations), 12 (Formal Proceedings), and 13 (Sanctions) to ESSOs regarding failure to comply with a requirement of this General Order.
- **Miscellaneous Provisions:** Applies Section 14 (Miscellaneous Provisions) to ESSs including ongoing reporting obligations (e.g. periodic recertifications), filings and submissions, provisions for confidentiality, etc.
- **Added Appendix E:** Updates applicable Industry Codes, Standards, Organizations, and Abbreviations and Acronyms.

STAKEHOLDER INPUT AND PARTICIPATION

Prior to developing its proposed updates, ESRB staff met with industry stakeholders and solicited feedback at three technical workshops. The workshops were held on March 26, 2024, May 30, 2024, and August 23, 2024. The workshops were publicly noticed in the Commission's Daily Calendar. Notice was sent to ESSOs, GAOs, and the service lists for Rulemaking (R.) 23-10-011 (Resource Adequacy) and R.20-05-003 (Integrated Resource Planning).

For each workshop, staff suggested proposed changes to GO 167 and discussed these changes with the participants. Participants were provided with an opportunity to ask questions and make comments on the proposals. Workshop participants were also able to submit written comments in response to each proposal. Eleven organizations submitted comments:²⁰ Applied Energy Services, Calpine Corporation, California Energy Storage Alliance, Clearway Energy Group, Independent Energy Producers Association, MegaWatt Storage Farms, REV Renewables, Rural County Representatives of California, San Diego Gas & Electric Company, Southern Power Company, and Terra-Gen, LLC. The stakeholder comments focused on the following topics. First, many comments emphasized the need for clarity in the terms and reporting requirements. Second, several commenters suggested changes to the implementation and reporting timelines because of the complexity involved in implementing new reporting requirements and the differing operating processes of systems, respectively. Third, some comments suggested that the revisions to the GO should take place in a Commission rulemaking proceeding.

²⁰ The comments from the three workshops are available here: [March 26, 2024 Workshop](#), [May 30, 2024 Workshop](#), and [August 23, 2024 Workshop](#) and may also be found on the [ESRB website](#).

The current proposal for GO 167 reflects the input received from these external stakeholders as part of that iterative process.

NOTICE

Pub. Util. Code § 311(g)(1) provides that this Resolution must be served on all parties and subject to at least 30 days public review and comment prior to a vote of the Commission. Section 311(g)(2) provides that this 30-day period may be reduced or waived upon stipulation of all parties in the proceeding.

The 30-day comment period for the draft of this Resolution was neither waived nor reduced. Accordingly, this draft resolution was distributed for comment pursuant to Commission Rule of Practice and Procedure 14.5 on January 27, 2025. Comments were received on February 25, 2025 by Electric Power Research Institute, Inc. (EPRI) and on March 3, 2025 by 24M Technologies (24M), Aypa Power (Aypa), The California Energy Storage Alliance (CESA), California State Association of Electrical Workers and the Coalition of California Utility Employees (CSAEW/CCUE), Independent Energy Producers Association (IEP), NextEra Energy Resources, LLC (NEER), and Southern Power Company (Southern Power).

COMMENT SUMMARY

All commenters support the adoption of ESRB-13. Several commenters submitted suggested revisions detailed below. Aypa comments that the proposed changes are beneficial to public safety, service reliability, and may help prevent future incidents involving fatalities, injuries, and safety and reliability issues.²¹ CESA relays appreciation for the updates to the implementation timeline allowing existing facilities 180 days to comply with the requirements set forth in the order and expresses eagerness to comply.²² Southern Power comments that the proposed changes more clearly define the applicability of GO 167-C to assets in active service.²³ NEER states its support for the Commission's effort to enforce maintenance and operations standards, as well as track safety related incidents in the ESS fleet.²⁴ Neer also finds the Commission's efforts particularly important given recent safety-related incidents and the potential for those incidents to undermine the valuable contributions that ESS offers to California in its efforts to maintain reliability while transitioning to a carbon neutral economy.²⁵ NEER

²¹ Aypa Comments on Draft Resolution ESRB-13 (Aypa Comments) at 1.

²² CESA Final Comments – Draft Resolution ESRB 13 (CESA Comments) at 2.

²³ Reply Comments of Southern Power on Proposed GO-167-B Revisions (Southern Power Comments) at 1.

²⁴ NextEra Energy Resources Comments – Draft Resolution ESRB 13 (NEER Comments) at 1.

²⁵ NEER Comments at 1.

agrees it is reasonable for SED to request an ESS owner conduct a test or technical evaluation for determining compliance standards enforced by the Draft Resolution.²⁶ CSAEW/CCUE agree that the amendments are an essential first step toward reducing the likelihood of catastrophic incidents caused by ESS facilities.²⁷ Similarly, IEP recognizes the need for the Commission to adopt such amendments, stating that it believes most generators and energy storage owners will be able to accept and comply with the proposed changes.²⁸ 24M expresses strong support for the Commission's efforts to enhance battery storage facilities.²⁹ Lastly, EPRI finds that CPUC's mandates in OS- 20(d) aligns with leading industry practice.³⁰

Logbook Standards

IEP and Southern Power raise several concerns about the proposed revisions to the Logbook Standards. They argue that the standards were written to apply to a range of categories of generation and storage resources but fail to account for operational differences between conventional thermal and ESS and Renewable Generating assets. They state ESS and Renewable Generating assets have inherent output and available capacity variances due to weather and other factors.³¹ Facilities are required to log "any changes to the facility MW output," which could be burdensome if a renewable energy source, such as wind and solar, changes output or availability frequently.³² To resolve this issue, Southern Power suggests removing language surrounding changes to the future scheduled facility output or clarifying the frequency of reporting to account for output variances.³³ To address facility-specific operating characteristics, ESSOs are required to establish facility-specific written logbook protocols. We require logbook protocols for all ESSs to address facility specific operating characteristics. EPRI agrees that the ESS logbook standards are in accordance with leading industry practices.³⁴

²⁶ NEER Comments at 4.

²⁷ Comments of the California State Association of Electrical Workers and the California Coalition of Utility Employees on Draft Resolution ESRB-13 (CSAEW and CCUE Comments) at 1.

²⁸ Comments of the Independent Energy Producers Association on Draft Resolution ESRB-13, Regarding Adoption of General Order 167-C (IEP Comments) at 5.

²⁹ Comments of 24M Technologies on Draft Resolution ESRB-13 Regarding Adoption of General Order 167-C (24M Comments) at 2.

³⁰ Comments of the Electric Power Research Institute on California Public Utility Commission CPUC Resolution ESRB-13 (EPRI Comments) at 4.

³¹ IEP Comments at 7-8; Southern Power Comments at 1-2.

³² IEP Comments at 7-8; Southern Power Comments at 1-2.

³³ Southern Power Comments at 1-2.

³⁴ EPRI Comments at 4.

IEP also notes that the standards apply to “Renewable Generating Assets” but that term is not defined in the draft General Order, which only refers to “solar, wind, [and] geothermal energy.”³⁵ Based on the comments, we clarify the definition of Renewable Generating Asset means “an electrical generating facility that uses biomass, solar thermal, solar photovoltaic, wind (inland and offshore), geothermal, fuel cells, digester gas, municipal solid waste conversion, landfill gas, ocean wave, ocean thermal, or tidal current, and any additions or enhancements to the facility using that technology.”

Southern Power also recommends adding an additional category for significant equipment trips where the cause is initially unknown that could be updated after the GA or ESSO determines the cause.³⁶ They suggest that reductions to minimum load should only be reported if determined to be caused by abnormal operating conditions, and seek a new exemption allowing a GAO to utilize an Outage Management System to track outage related activities.³⁷ They also make other recommendations to reduce reporting requirements, such as removing the Operator Control Log and only requiring recordable communications with external entities to be reported if they are telephone conversations.³⁸ We believe reducing reporting and increasing exemptions would be at the detriment of public safety and decline to adopt these recommendations.

CESA requests an additional exemption for GA and ESS Logbook standards relating to facility status entry requirements.³⁹ For the same reasons, we decline to adopt CESA’s recommendation.

Maintenance Standards and Operations Standards

CSAEW/CCUE, CESA, NEER, and EPRI request clarification of specified terms. CSAEW/CCUE argue Maintenance Standard and Operation Standards 5 and 6, are vague because they fail to define the phrases “trained and qualified,” “knowledge and skills needed,” what constitutes a “high level of personnel knowledge, skill and performance,” and fail to establish minimum workforce training requirements.⁴⁰ CESA believes the term “equipment” within the logbook standard is unclear.⁴¹ EPRI requests clarification of various terms, including “prudent practices,” “prudent industry

³⁵ IEP Comments at 8.

³⁶ Southern Power Comments at 2.

³⁷ Southern Power Comments at 2.

³⁸ Southern Power Comments at 2.

³⁹ CESA Comments at 2.

⁴⁰ CSAEW/CCUE at 2.

⁴¹ CESA Comments at 2.

practices,” and “reasonable,”⁴² EPRI also notes that specific references to standards established by outside industries could be a useful resource. We believe these terms are clear and subject to well-known and understood industry standards as well as the existing General Order 167 and decline to adopt these recommendations.

Southern Power believes the reporting requirements in Operations Standard (OS) 25 should not apply to changes in minority ownership that do not impact facility operations.⁴³ It is essential to our authority and oversight that we are aware of any changes in ownership by a “person or entity owning, controlling, operating, maintaining, or managing an ESS facility”⁴⁴, and any parent company that owns, controls, operates or manages the ESS whose change of ownership may impact the operations and maintenance of that asset. The OS 25 notification requirement does not apply if a change in ownership does not meet this definition.

CSAEW/CCUE offer joint comments relating to workforce standards. They ask the Commission to address workforce qualifications and training for ESS personnel. They argue that all facilities exceeding 1 MW should be required to meet the workforce standards in GO 167-C.⁴⁵ They also believe all electrical work on large and medium ESS facilities should be required to be performed by certified electricians, and at least 50% of onsite electricians should be required to hold an Energy Storage and Microgrid Training Certification.⁴⁶ The Maintenance and Operations Standards apply to all maintenance and operations activities, not only electrical work. While ensuring personnel are trained and qualified is essential, listing specific training for every role would be overly prescriptive. The current language allows facilities to develop training programs aligned with regulatory codes, engineering standards, operational needs, and best practices in the industry, ensuring personnel have the necessary skills for safe and effective facility management. As such, we decline to adopt their recommendation.

Safety-Related Incidents Reporting (Section 9)

NEER and Southern Power raise concerns that the reporting requirements are too broad, leading to excessive and burdensome over-reporting of non-hazardous instances. NEER suggests that the Commission modify its position about which safety related incidents require notification, asserting that emissions below permissible limits

⁴² EPRI Comments at 2.

⁴³ Southern Power at 3.

⁴⁴ Draft GO 167-C, Attachment to Draft Resolution ESRB-13 at 3.

⁴⁵ CSAEW/CCUE at 2.

⁴⁶ CSAEW/CCUE at 3-5.

established by Cal/OSHA do not represent a safety risk.⁴⁷ It requests the proposed language be changed to define hazardous emissions as “hazardous emissions beyond the permissible exposure limits set by Cal/OSHA.”⁴⁸ NEER also requests the property damage threshold be added as a qualifying requirement for the “malfunction or failure” rule. We believe the public is better protected by reporting all hazardous emissions, not just those beyond permissible limits. Additionally, the language in GO 167-C is clear that reporting is limited to occasions where there is a fire, explosion, hazardous emission, or other safety related event. Because all hazardous emissions should be reported, we decline to accept this recommendation.

NEER, Southern Power and IEP express concern that the \$50,000 threshold for reporting property damage in Section 9.4 of GO 167-C is too low. Southern Power Company seeks an increase in the property damage threshold from \$50,000 to \$500,000, while NEER suggests increasing this threshold to \$1,000,000.⁴⁹ IEP notes that a preliminary draft of the proposed changes to GO 167-C also suggested raising this threshold to \$200,000 and argues that a higher number may be justified.⁵⁰ The \$50,000 property damage threshold was established in 2005. We agree that the reporting requirement threshold should be raised to \$200,000 to reflect inflation and rising costs of technology and equipment.

Aypa requests the requirement to house spare parts at the facility site be revised, stating that in some instances it is impractical to store spare parts on-site.⁵¹ We decline to adopt Aypa’s recommendation. We believe requiring spare parts to be on-site ensures they will be available to keep operations running smoothly and avoid unnecessary downtime due to equipment failures, which will enhance energy reliability.

EPRI requests collection of outage and availability data be refined by creating ESS specific codes for CAISO’s generator data.⁵² They argue that more detailed information gathering will help inform future actions. EPRI also requests more detailed environmental information, investigations, and root cause analyses be mandated for reportable incidents.⁵³ We decline to accept EPRI’s recommendations. We rely on environmental protection partners to analyze and evaluate environmental impacts. While we agree with EPRI that additional information could be informative, sometimes

⁴⁷ NEER Comments at 2.

⁴⁸ NEER Comments at 2.

⁴⁹ Southern Power Comments at 1; NEER Comments at 3.

⁵⁰ IEP Comments at 7.

⁵¹ Aypa Comments at 4.

⁵² EPRI Comments at 4.

⁵³ EPRI Comments at 3.

environmental testing is not available at the time incident reports are submitted. When a facility experiences a significant catastrophic or systemic failure, we gather root cause analyses through data requests to identify the cause and to prevent failures from reoccurring. Some incidents are not serious enough to require a root cause analysis, so requiring one in every incident would be unduly burdensome.⁵⁴ We acknowledge the value of collecting information and analyzing significant incidents and failures, however they are not publicly available and not every safety-related incident will require a root cause analysis.

Audits, Inspections, and Investigations (Section 10)

NEER raises concerns that repeated testing and enforcement by SED could result in insufficient time for ESS facilities to implement new requirements, imposing significant cost to the ESS facility that would ultimately be borne by consumers.⁵⁵ NEER suggests changes to Section 10.3 of GO 167-C to specify when SED is authorized to request testing, retesting, and technical evaluations.⁵⁶ We decline to adopt this recommendation. SED fills the compliance and enforcement role within the Commission for purposes of protecting the public from harm. SED follows proactive enforcement procedures, rather than reactive, to prevent public harm before it occurs. Imposing limitations and burdens on SED's ability to ensure compliance with GO 167-C by ESS facilities would constitute an unreasonable threat to public safety.

Southern Power seeks an extension of the time to report non-OSHA-recordable events from 24 to 48, or even 72, hours to allow sufficient time for investigation and mitigation during ongoing situations.⁵⁷ To ensure we are aware of safety incidents, an initial report is required within 24 hours. Initial reports can be filed with available information and supplemented at a later time, but we decline to adopt this recommendation to ensure we are well-informed and up to date. They also request the scope of reportable injuries and illnesses be modified to require admission to a hospital to align with OSHA-reportable requirements, and that third-party audits and tests conducted pursuant to a Power Purchase Agreement be allowed in lieu of tests and technical evaluations requested by the Commission where appropriate.⁵⁸ We will accept results of tests and audits if they are applicable to the type of test or technical evaluation sought at our discretion, and this is already practiced in relation to tests performed for CAISO or other contracts. We decline to impose further limitations on reporting, as it is important we are aware of all injuries and illnesses.

⁵⁴ CESA Workshop 2 Comments (June 27, 2024) at 4.

⁵⁵ NEER Comments at 4-5.

⁵⁶ NEER Comments at 4-5.

⁵⁷ Southern Power at 1.

⁵⁸ Southern Power at 1.

EPRI states that reviewing emergency response plans on an annual basis would ensure they are up to date.⁵⁹ Operation Standard 20 requires ESSOs and GAOs to train personnel in the emergency plan periodically, which can be comprised of annual emergency drills. We do not believe there is a need to further specify the frequency of review and decline to adopt this recommendation.

IEP notes that the revisions remove the word “monthly” in Section 9.3.1 relating to outage reports to the ISO.⁶⁰ They state that, while the reports are required to be submitted monthly by statute,⁶¹ removing the word in GO 167-C could cause confusion and inconsistency. The statute requires that the CAISO provide a daily report of generation and storage outages to the Commission, and “each entity that that owns or operates an electric generating unit in California with a rated maximum capacity of 10 megawatts or greater shall provide a monthly report.”⁶² The reference to the monthly report does not apply to ESS. Current CAISO outage reporting rules require that GAOs and ESSOs report outages of 10 MWs and greater or 5% of PMAX within an hour of the outage start.⁶³ We disagree with IEP and decline their recommendation to add the word “monthly” to Section 9.3.1.

IEP also expresses confusion about whether reports of significant media coverage are required to be submitted within 24 hours of an incident as specified.⁶⁴ They believe it is reasonable to allow 5 business days to report those incidents. We believe the language of GO 167-C is clear as to the reporting timelines and decline to adopt their recommendation.

Other Comments

CESA and IEP express concerns about instituting changes to GO 167 through a resolution.⁶⁵ They request instead that the Commission open a rulemaking proceeding for consideration of future amendments to GO 167-C and to create a more structured forum for stakeholders to provide feedback.⁶⁶ EPRI observes that annual training and workshops would improve emergency response and coordination with local first

⁵⁹ EPRI at 4.

⁶⁰ IEP Comments at 6.

⁶¹ Pub. Util. Code § 761.3(e).

⁶² Pub. Util. Code 761.3(e).

⁶³ CAISO Tariff Section 9 and CAISO Business Practice Manual (BPM) for Outage Management, Section 4.0 Outage Reporting at 28.

⁶⁴ IEP Comments at 6-7.

⁶⁵ IEP Comments 1-6; CESA Comments at 1.

⁶⁶ IEP Comments at 5-6; CESA Comments at 1.

response agencies, which could occur through an ongoing rulemaking proceeding.⁶⁷ We reiterate that it is appropriate to institute changes to General Order 167 through a Commission resolution. Whether to open a rulemaking to consider further amendments to GO 167-C is outside of the scope of this resolution.

CESA and Aypa support the 180-day timeline for existing facilities to comply with the requirements of GO 167-C but express concern with the shorter implementation deadlines for new facilities, defined as facilities with a Commercial Operation Date (COD) within six months of the final approval of GO 167-C.⁶⁸ The current proposal requires new facilities to submit the Verified Statement for Logbook Standards within 30 days of their COD and the Initial Certification of Maintenance and Operations Standards within 90 days of their COD. Aypa and CESA both suggest extending the 180-day timeline for existing facilities to also apply to new facilities.⁶⁹ In response to these comments, we have revised the deadlines. New facilities must submit their Verified Statement within 180 days of the effective date of GO 167-C or 30 days of being placed into active service, whichever is later. New facilities must submit their Initial Certification within 180 days of the effective date of GO 167-C or 90 days of being placed into active service.

24M Technologies recommends the Commission recognize and encourage advanced battery safety technologies and consider adopting performance-based standards for in-cell safety technologies that are equivalent to industry standards and best practices.⁷⁰ EPRI suggests the Commission link specified requirements to guidelines established by the North American Electric Reliability Corporation.⁷¹ We are advancing safe technology and industry standards through this General Order to ensure public protection and increase availability of safe, affordable, and reliable energy for the state.

⁶⁷ EPRI Comments at 4.

⁶⁸ CESA Comments at 2; Aypa Comments at 4.

⁶⁹ Aypa Comments at 4; CESA Comments at 2.

⁷⁰ 24M Comments at 2.

⁷¹ NERC at 2.

FINDINGS

1. SB 1383 mandated the implementation and enforcement of standards for the maintenance and operation of ESS.
2. SB 38 required the creation of requirements for Emergency Response and Emergency Action Plans applied to ESSOs.
3. The Commission should modify Section 2 of GO 167 to include definitions of ESS and ESSOs and to revise other sections relevant to ESSs.
4. The changes proposed by ESRB to GO 167 provide necessary updates to definitions, references, industry codes, and standards.
5. The changes proposed by ESRB to GO 167 modify Maintenance and Operation Standards for Generating Assets, add provisions to enhance safety, reliability, and effectiveness of Generating Assets and Energy Storage Systems operation and maintenance, update procedures, references, and definitions, and remove obsolete references and add relevant language.
6. Regulatory oversight of ESS facilities is required by statute and necessary because of the safety and reliability risks that can occur if ESS facilities are not properly operated and maintained.
7. The proposed changes to GO 167 represent time-sensitive safety measures required for the CPUC to ensure the safety and reliability of ESSs.
8. The proposed changes are beneficial to public safety, service reliability, and may help prevent future incidents involving fatalities, injuries, and safety and reliability issues.
9. The proposed changes to GO shall be effective today.
10. GO 167 was adopted in 2004 and has been revised by both resolution and decision over the past twenty years.

THEREFORE, IT IS ORDERED that:

1. General Order 167-C (as shown in Appendix A to this Resolution) is adopted to supersede General Order 167-B.
2. GO 167-C is effective today.
3. Within 15 days of the effective date of this resolution, the Safety and Enforcement Division shall post a revised GO 167-C on the Commission's web site.
4. This resolution is effective today.

I certify that the foregoing resolution was duly introduced, passed, and adopted at a conference of the Public Utilities Commission of the State of California held on March 13, 2025 the following Commissioners voting favorably thereon:

/s/ RACHEL PETERSON

Rachel Peterson
Executive Director

ALICE REYNOLDS

President

DARCIE L. HOUCK

JOHN REYNOLDS

KAREN DOUGLAS

MATTHEW BAKER

Commissioners

**PUBLIC UTILITIES COMMISSION OF
THE STATE OF CALIFORNIA**

GENERAL ORDER NO. 167-C

**ENFORCEMENT OF MAINTENANCE
AND OPERATION STANDARDS FOR
ELECTRIC GENERATING FACILITIES
AND ENERGY STORAGE SYSTEMS**

EFFECTIVE SEPTEMBER 02, 2005

**DECISION (D.) 04-05-017 ADOPTED MAY 6, 2004;
D.04-05-018 ADOPTED MAY 6, 2004;
D.04-12-049 ADOPTED DECEMBER 16, 2004;
D.05-08-038 ADOPTED AUGUST 25, 2005,
IN RULEMAKING 02-11-039; AS MODIFIED BY
D.06-01-047 ADOPTED JANUARY 26, 2006;
AS MODIFIED BY RESOLUTION NO. E-4184
ADOPTED AUGUST 21, 2008; AND AS MODIFIED BY
D.08-11-009 ADOPTED NOVEMBER 6, 2008)
RESOLUTION ESRB-9 ADOPTED JUNE 21, 2021
RESOLUTION ESRB-13 ADOPTED MARCH 13, 2025**

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1.0 PURPOSE

The purpose of this General Order (GO) is to implement and enforce standards for the maintenance and operation of electric generating facilities, power plants, and energy storage systems (ESSs) so as to maintain and protect the public health and safety of California residents and businesses by ensuring that electric Generating Assets (GAs) and ESSs are effectively and appropriately maintained and efficiently operated, and to ensure electrical service reliability and adequacy. The General Order provides a continuing method to implement and enforce Maintenance Standards (MS), and Operation Standards (OS), and any other standard adopted pursuant to Public Utilities (Pub. Util.) Code § 761.3 (Chapter 19 of the Second Extraordinary Session of 2001-02 (SBX2 39, Burton), as amended by Stats. 2022, Chapter 725 (SB 1383, Hueso) and Stats. 2023, Chapter 377 (SB 38, Laird). The General Order also provides a means to enforce the protocols for the scheduling of power plants and ESS outages of the California Independent System Operator. The General Order is based on the authority vested in the California Public Utilities Commission by the California Constitution; California statutes and court decisions; prior Commission decisions and orders; and Federal law including, but not limited to, the Federal Power Act, 16 U.S.C. § 791 *et seq.*, and Section 714 of the Energy Policy Act of 1992, 16 U.S.C. § 824(g). Nothing in this General Order diminishes, alters, or reduces the Commission's existing authority to inspect GAs and ESSs to request data from those GAs and ESSs to assure continued maintenance and operation of the facilities in order to support public safety and the reliability of California's electricity supply.

2.0 DEFINITIONS/ACRONYMS

2.1 ACTIVE SERVICE

“Active Service” means the status of an electric generating asset or energy storage system that is interconnected, is capable of operating in parallel with the electricity grid and has achieved commercial operation.

2.2 CALIFORNIA INDEPENDENT SYSTEM OPERATOR OR ISO

“California Independent System Operator” or “ISO” is the nonprofit public benefit corporation authorized under Public Utilities (Pub. Util.) Code § 345 *et seq.* to operate California’s wholesale power grid. For the purpose of information-sharing under this General Order, ISO is considered to be a governmental agency.

2.3 COMMISSION

“Commission” means the California Public Utilities Commission.

2.4 EMERGENCY RESPONSE AND EMERGENCY ACTION PLAN

“Emergency Response and Emergency Action Plan” is the emergency response and emergency action plan required by Pub. Util. Code Section 761.3, subdivision (g).

2.5 ENERGY STORAGE SYSTEM OR ESS

“Energy Storage System” or “ESS” means commercially available technology that is capable of absorbing energy, storing it for a period of time, and thereafter dispatching the energy as provided in Pub. Util. Code § 2835-2839 (“Energy Storage Systems”). For the purposes of this General Order, the ESS must have a metered output, or an administratively defined group of generating or storage facilities, that may or may not have individual metered outputs that can be aggregated for performance measurement. However, for the purposes of this General Order, an ESS does not include:

2.5.1 A nuclear powered facility that is federally regulated and subject to standards developed by the Nuclear Regulatory Commission, and whose owner or operator participates as a member of the Institute of Nuclear Power Operations, provided that the owner or operator of such facility shall comply with the reporting requirements of Publ. Util. Code § 761.3 (c) (1) (B), and § 761.3 (c) (1) (c).

2.5.2 A qualifying small power production facility or a qualifying cogeneration facility within the meaning of Federal Power Act

(16 U.S.C. §§ 796 (17), 796 (18) & 824a-3) and the regulations adopted pursuant to those sections by the Federal Energy Regulatory Commission (18 C.F.R. §§ 292.101-602, inclusive), provided that an electrical corporation that has a contract with a qualifying small power production facility, or a qualifying cogeneration facility, with a nameplate rating of 10 megawatts or greater, shall comply with the reporting requirements of Pub. Util. Code § 761.3 (c) (2) (B).

- 2.5.3 Distributed storage systems owned by individual Load Serving Entity (LSE) customers.
- 2.5.4 A facility owned by a local publicly owned electric utility.
- 2.5.5 A facility at a public agency that is used to generate or store electricity incidental to the provision of water or wastewater treatment.
- 2.5.6 A facility owned by a city and county operating as a public utility, furnishing electric service as provided in Pub. Util. Code § 10001.

2.6 ENERGY STORAGE SYSTEM (ESS) OWNER OR ESSO

“Energy Storage System Owner” or “ESSO” means any person or entity owning, controlling, operating, maintaining, or managing an ESS facility. An ESS Owner includes, but is not limited to, an electrical corporation (as that term is defined in Pub. Util. Code § 218). “ESS Owner” does not include any governmental agency described in Pub. Util. Code § 761.3 (f) (1)-(3). Although for the various purposes of this General Order, more than one person or entity may meet the preceding definition, this section is not intended to require duplicate or redundant filings, or notifications for any particular ESS.

2.7 EXIGENT CIRCUMSTANCE

“Exigent circumstance” means any condition related to the operation and maintenance of a Generating Asset or Energy Storage System that may result in imminent danger to public health or safety, including electrical service reliability or adequacy, or to persons in the proximity of a Generating Asset or Energy Storage System.

2.8 GENERATING ASSET

“Generating Asset” means any device owned by an electrical corporation (as that term is defined in Pub. Util. Code § 218) or located in the State of California used for the generation of electric energy. To be a Generating Asset, the device must have a metered output, or an administratively defined group of generating devices that may or may not have individual metered

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outputs that can be aggregated for performance measurement. However, for the purposes of this General Order, a Generating Asset does not include:

- 2.8.1 A nuclear-powered generating facility that is federally regulated and subject to standards developed by the Nuclear Regulatory Commission, and whose owner or operator participates as a member of the Institute of Nuclear Power Operations, provided that the owner or operator of such a facility shall comply with the reporting requirements of Pub. Util. Code § 761.3 (C)(1)(B), and § 763.1(C)(1)(C).
- 2.8.2 A qualifying small power production facility or a qualifying cogeneration facility within the meaning of the Federal Power Act (16 U.S.C. §§ 796 (17), 796 (18), & 824a-3) and the regulations adopted pursuant to those sections by the Federal Energy Regulatory Commission (18 C.F.R §§ 292.101-602, inclusive), provided that an electrical corporation that has a contract with a qualifying small power production facility, or a qualifying cogeneration facility, with a nameplate rating of 10 megawatts or greater, shall comply with the reporting requirements of Pub. Util. Code § 761.3 (C) (2) (B).
- 2.8.3 A generation unit installed, operated, and maintained at a customer site, exclusively to serve that customer's load.
- 2.8.4 A facility owned by a local publicly owned electric utility.
- 2.8.5 A facility at a public agency that is used to generate electricity incidental to the provision of water or wastewater treatment.
- 2.8.6 A facility owned by a city and county operating as a public utility, furnishing electric service as provided in Pub. Util. Code § 10001.

2.9 GENERATING ASSET (GA) OWNER OR GAO

“Generating Asset (GA) Owner” or “GAO” means any person or entity owning, controlling, operating, or managing a Generating Asset.

“Generating Asset Owner” includes, but is not limited to, an electrical corporation (as that term is defined in Pub. Util. Code § 218). “Generating Asset Owner” does not include any governmental agency described in Pub. Util. Code § 761.3 (f) (1)-(3). Although for the various purposes of this General Order, more than one person or entity may meet the preceding definition, this section is not intended to require duplicate or redundant filings or notifications for any particular Generating Asset.

- 2.10 GENERATING ASSET AND ENERGY STORAGE SYSTEM LOGBOOK STANDARDS**
Generating Asset and Energy Storage System Logbook Standards are set forth as Appendix A of this General Order and include any subsequent amendments or revisions of those standards.
- 2.11 GENERATING ASSET AND ENERGY STORAGE SYSTEM MAINTENANCE STANDARDS**
“GA and ESS Maintenance Standards” are set forth in Appendix C and include any subsequent amendments or revisions to those standards.
- 2.12 GENERATING ASSET AND ENERGY STORAGE SYSTEM OPERATION STANDARDS**
“Generating Asset and Energy Storage System Operation Standards” are set forth as Appendix D to this General Order and includes any subsequent amendments or revisions to those standards.
- 2.13 GENERATING AVAILABILITY DATA SYSTEM OR GADS**
“Generating Availability Data System” or “GADS” means the data base system maintained by the North American Electric Reliability Corporation (NERC) which collects, records, and retrieves operating information for improving the performance of electric generating equipment.
- 2.14 HYDROELECTRIC ENERGY LOGBOOK STANDARDS**
“Hydroelectric Energy Logbook Standards” are set forth as Appendix B to this General Order and includes any subsequent amendments or revisions to those standards.
- 2.15 INITIAL CERTIFICATION**
“Initial Certification” means the first document filed by a GA or ESS Owner for a specific GA or ESS certifying that the GA or ESS Owner has adopted and is implementing a Maintenance Plan for that GA or ESS as required by Section 6.0 of this General Order, or an Operation Plan for that GA or ESS as required by Section 7.0.
- 2.16 NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION OR NERC**
“NERC” means the North American Electric Reliability Corporation or any successor thereto.
- 2.17 NOTIFY SAFETY AND ENFORCEMENT DIVISION, FILE WITH THE COMMISSION, FILING, OR FILE**
“Notify Safety and Enforcement Division (SED),” “file with the Commission,” “filing,” or “file” means (unless otherwise indicated) to send an electronic notification to GO167@cpuc.ca.gov. These written communications are not filed with the Commission’s Docket Office.

2.18 OUTAGE COORDINATION PROTOCOL

“Outage Coordination Protocol” means that document set forth as Section 9.0 (effective November 1, 2023) in the ISO tariff to coordinate schedules for maintenance, repair and construction of energy storage and generating units, sections of the ISO controlled grid, and interconnections, as well as any subsequent amendments to the document.

2.19 OUTAGE MANAGEMENT SYSTEM OF CALIFORNIA OR OMS

“Outage Management System” or “OMS” is a web-based system application and procedure, and any successor system, used by the ISO and external clients for scheduling of generator outages.

2.20 SAFETY AND ENFORCEMENT DIVISION OR SED

“Safety and Enforcement Division” or “SED” means that division of the Commission, or any successor entity, designated by the Commission to enforce this General Order.

2.21 STANDARDS

“Standards” is a collective term including all the individual standards enforced pursuant to this General Order: Hydroelectric Energy Generating Logbook Standards, GA and ESS Logbook Standards, GA and ESS Maintenance Standards, GA and ESS Operation Standards, and the Outage Coordination Protocol/standards of the ISO, as set forth in Subsection 8.1 of this General Order.

2.22 RENEWABLE GENERATING ASSET

“Renewable Generating Asset” means an electrical generating facility that uses biomass, solar thermal, solar photovoltaic, wind (inland and offshore), geothermal, fuel cells, digester gas, municipal solid waste conversion, landfill gas, ocean wave, ocean thermal, or tidal current, and any additions or enhancements to the facility using that technology.

2.23 THERMAL ENERGY

“Thermal Energy” is the production of electricity from heat generated from combustion of fuels, recovery of heat from discharges from a turbine or other device powered by the combustion of fuels.

3.0 REQUIRED COMPLIANCE

3.1 BASIC REQUIREMENT

Unless exempted below, all GA or ESS Owners shall comply with all Standards and all sections of this General Order for each GA or ESS. A GA or ESS's eligibility for an exemption shall be determined by summing the nameplate rating for all units of the GA and/or ESS.

3.2 SMALL FACILITIES

GAs or ESSs, smaller than one megawatt, are currently exempt from enforcement of the Standards pursuant to this General Order. Notwithstanding this exemption, GA or ESS Owners of such Generating Assets and ESSs shall cooperate in any Commission or SED investigation, inspection, or audit by permitting access to those Generating Assets or ESSs and by providing information (orally or written) or documents about the maintenance and operation of those Generating Assets or ESSs if so requested by the Commission or SED.

3.3 MEDIUM FACILITIES

GAs or ESSs of one megawatt or larger but smaller than 50 megawatts are exempt from Hydroelectric Energy Logbook Standards, GA and ESS Logbook Standards, Maintenance Standards, and Operation Standards. Accordingly, such Generating Assets and ESSs are subject to all requirements of this General Order except for Sections 4.0 (“GA and ESS Logbook Standards”), 5.0 (“Hydroelectric Logbook Standards”), 6.0 (“Generating Asset and Energy Storage System Maintenance Standards”), and 7.0 (“Generating Asset and Energy Storage System Operation Standards”). Notwithstanding these exemptions, such facilities must follow prudent practices as required by Sections 4.2, 5.2, 6.4, and 7.4.

3.4 SWITCHING CENTERS

Switching centers controlling 50 megawatts or more of hydroelectric power must keep logbooks concerning switching center operations for all remotely controlled Generating Assets of one megawatt or larger, as provided in Section 5.2.

3.5 HYDROELECTRIC FACILITIES

Hydroelectric facilities licensed by the Federal Energy Regulatory Commission are exempt from Sections 6.0, 7.0, 8.0, 9.3, 9.4, and 14.1.

4.0 GENERATING ASSET AND ENERGY STORAGE SYSTEM LOGBOOK STANDARDS

4.1 REQUIRED LOGBOOKS

Unless exempted, all GA or ESS Owners shall maintain facility logbooks in conformance with the GA and ESS Logbook Standards for Generating Assets. GAs are defined by Section 2.8 and ESSs are defined by Section 2.5.

4.2 EXEMPTION

GAs or ESSs of less than 50 megawatts are exempt from Section 4.0. Notwithstanding this exemption, each Generating Asset one megawatt and larger but less than 50 megawatts is required to maintain a reasonable log of

operations and maintenance in a manner consistent with prudent industry practice.

4.3 VERIFIED STATEMENT

For each nonexempt GA or ESS, the GA or ESS Owner shall file one original verified statement with the Director of the Commission's SED. The verified statement shall include the following:

- 4.3.1 The identity of the GA or ESS owned by an electrical corporation, Limited Liability Corporation (LLC) or sole proprietor located in California (with relevant identification and contact information);
- 4.3.2 Confirmation that the facility is maintaining logbooks in compliance with the requirements for GA and ESS Logbook Standards;
- 4.3.3 Confirmation that the compliance document required by Subsection 4.5 has been prepared and is available at the GA or ESS facility;
- 4.3.4 Confirmation that logbooks and the compliance document are being and will be updated and maintained as necessary; and
- 4.3.5 Signature, name, title, address, telephone number, electronic mail address, CAISO Resource ID, and other relevant information regarding the authorized representative of the GA or ESS Owner.

4.4 TIME OF FILING

4.4.1 TIME OF FILING FOR ASSETS IN ACTIVE SERVICE BEFORE THE EFFECTIVE DATE OF GO 167-C

For each GA or ESS placed in Active Service before the effective date of this General Order, the GA or ESS Owner shall file the Verified Statement within 180 days of such effective date.

4.4.2 FOR THE NEW OR ACQUIRED ASSETS

For each GA or ESS placed in Active Service after the effective date of this General Order, the GA or ESS Owner shall file the Verified Statement within 180 days of such effective date of GO 167-C or 30 days of the GA being placed in Active Service, whichever date is later. When a GA or ESS Owner acquires a GA or ESS from an existing GA or ESS Owner, the new owner shall file a verified statement within 180 days of the effective date of GO 167-C, 30 days of the effective date of the transfer of title, or within 30 days of the transfer of possession, whichever date is later.

4.5 COMPLIANCE DOCUMENT

Each GA or ESS Owner shall prepare and maintain a compliance document. The compliance document will be available at the generation facility or energy storage facility site. The compliance document will show:

- 4.5.1 Where data required by the GA and ESS Logbook Standards are recorded and maintained;
- 4.5.2 How data are recorded and maintained (*e.g.*, hard copy or electronic);
- 4.5.3 Any necessary format or presentation protocols that must be understood to decipher the meaning of the electronically or manually maintained data; and
- 4.5.4 Anything else reasonably necessary to fulfill or demonstrate compliance with the GA and ESS Logbook Standards.

4.6 ELECTRONIC DATABASE MINIMUM REQUIREMENTS

GAs and ESSs which are in the planning stage on the effective date of this subsection, and all future GAs and ESSs, shall employ electronic database systems for maintaining GA and ESS logbooks, and such systems shall meet the following minimum requirements. When logbooks are updated at an existing GA or ESS site to include electronic database systems, the logbook systems shall meet the following minimum requirements. The minimum requirements are that the logbook electronic database systems are:

- 4.6.1 Electronically searchable; and
- 4.6.2 Secure (*i.e.*, changes are tracked and documented).

5.0 HYDROELECTRIC ENERGY LOGBOOK STANDARDS

5.1 REQUIRED LOGBOOKS

Unless exempted, all GA Owners shall maintain facility logbooks in conformance with the Hydroelectric Energy Logbook Standards for those GAs generating electricity by the use of hydroelectric energy.

5.2 EXEMPTION

Locally-controlled generating assets smaller than 50 megawatts are exempt from the entirety of this Section 5.0. Notwithstanding this exemption, each locally-controlled GA of one megawatt or larger is required to maintain a reasonable log of operations and maintenance in a manner consistent with prudent industry practice. Switching centers that control 50 megawatts or more do not fall under this exemption and must keep logbooks concerning

switching center operations for all remotely-controlled GAs of one megawatt or larger.

5.3 VERIFIED STATEMENT

For each nonexempt GA, the GA Owner shall file one original verified statement with the Director of the Commission's SED. The verified statement shall include at least the following:

- 5.3.1 The identity of the GA owned by an electrical corporation or located in California (with relevant identification and contact information);
- 5.3.2 Confirmation that the facility is maintaining logbooks in conformance with the Hydroelectric Energy Logbook Standards;
- 5.3.3 Confirmation that the compliance document required by Subsection 5.5 has been prepared and is available at the generation facility site or remote control or switching center;
- 5.3.4 Confirmation that logbooks and the compliance document are being and will be updated and maintained as necessary; and
- 5.3.5 Signature, name, title, address, telephone number, electronic mail address, and other relevant information regarding the authorized representative of the Generating Asset Owner.

5.4 TIME OF FILING FOR NEW OR ACQUIRED ASSETS

For each GA placed in Active Service after the effective date of this General Order, the GA Owner shall file the Verified Statement within 30 days of the GA being placed in Active Service. When a GA Owner acquires a GA from an existing GA Owner, the new owner shall file a verified statement within 30 days of the effective date of the transfer of title or within 30 days of the transfer of possession, whichever date is later.

5.5 COMPLIANCE DOCUMENT

Each GA Owner shall prepare and maintain a compliance document. The compliance document will be available at the generation facility site or remote control or switching center. The compliance document will show:

- 5.5.1 Where data required by the Hydroelectric Energy Logbook Standards are recorded and maintained;
- 5.5.2 How data are recorded and maintained (*e.g.*, hard copy or electronic);

- 5.5.3 Any necessary format or presentation protocols that must be understood to decipher the meaning of the electronically or manually maintained data; and
- 5.5.4 Anything else reasonably necessary to fulfill or demonstrate compliance with the Hydroelectric Energy Logbook Standards.

6.0 GENERATING ASSET AND ENERGY STORAGE SYSTEM MAINTENANCE STANDARDS

6.1 APPLICABILITY OF STANDARDS

All GA and ESS Owners shall maintain their GAs or ESSs in compliance with the GA and ESS Maintenance Standards ("Maintenance Standards"). Guidelines on how a Generating Asset Owner may comply are available from SED.

6.2 MAINTENANCE PLAN

6.2.1 CONTENTS

A Maintenance Plan is a paper or electronic document that shows how the GA or ESS Owner's maintenance practices and policies comply with each Maintenance Standard for each GA or ESS. The Maintenance Plan may be in the form of a narrative, index, spreadsheet, database, web site, or other. The Maintenance Plan shall specifically identify the procedures and criteria that are used to comply with each Maintenance Standard. Existing equipment manuals, checklists, warranty requirements, and other documents may be identified to demonstrate compliance. If any of these documents are contradictory, the Maintenance Plan should resolve the contradiction. Where the GA or ESS Owner maintenance does not satisfy a Maintenance Standard, the Maintenance Plan shall show how and when maintenance will be brought into compliance.

6.2.2 AVAILABILITY

The current Maintenance Plan for each GA or ESS will be available in the vicinity of each GA or ESS, in the case of a plant or facility with multiple Generating Assets or ESSs, in the central business office located at that plant or facility. Upon SED's request, a GA or ESS Owner shall submit the current Maintenance Plan (or requested portion thereof) to SED in the manner specified in Subsection 14.2 of this General Order.

6.2.3 INITIAL CERTIFICATION

The GA or ESS Owner shall file an Initial Certification with SED that certifies either:

6.2.3.1 COMPLIANCE

The GA or ESS Owner has adopted and is implementing a Maintenance Plan that complies with all GA and ESS Maintenance Standards, or

6.2.3.2 NONCOMPLIANCE

The GA or ESS Owner has (a) identified and documented deficiencies in its maintenance practices and policies, and (b) adopted a course of corrective actions that is reasonably designed to achieve compliance with the GA and ESS Maintenance Standards within 180 days of the date of Initial Certification.

6.2.4 FILING DATE FOR INITIAL CERTIFICATION

6.2.4.1 TIME OF FILING FOR ASSETS IN ACTIVE SERVICE BEFORE THE EFFECTIVE DATE OF GO 167-C

For each GA or ESS in Active Service before the effective date of this General Order, the GA or ESS Owner shall file the Initial Certification within 180 days of such effective date.

6.2.4.2 TIME OF FILING FOR NEW OR ACQUIRED ASSETS

For each GA or ESS placed in Active Service after the effective date of this General Order, the GA or ESS Owner shall file the Initial Certification within 180 days of such effective date of GO 167-C or 90 days of the GA or ESS being placed in Active Service, whichever date is later. When a GA or ESS Owner acquires a GA or ESS from an existing GA or ESS Owner, the new owner shall file its Initial Certification within 180 days of the effective date of GO 167-C, 90 days of the effective date of the transfer of title, or within 90 days of the transfer of possession, whichever date is later.

6.3 MAINTENANCE PLAN SUMMARY

6.3.1 CONTENTS

A Maintenance Plan Summary is a paper or electronic document that summarizes the Maintenance Plan. It shall summarize how the

GA or ESS Owner's maintenance complies with each Maintenance Standard. It shall be in the format and include the content elements specified by the Commission's Executive Director. Where the GA or ESS Owner's maintenance does not satisfy a Maintenance Standard, the Maintenance Plan Summary shall summarize how and when maintenance will be brought into compliance.

6.3.2 FILING DATE

6.3.2.1 FILING DATE FOR ASSETS IN ACTIVE SERVICE BEFORE THE EFFECTIVE DATE OF GO 167-C

Each GA or ESS in Active Service before the effective date of this General Order shall file the Maintenance Plan Summary at the same time as it files its Initial Certification.

6.3.2.2 FILING DATE FOR NEW OR ACQUIRED ASSETS

For each GA or ESS placed in Active Service after the effective date of this General Order, the GA or ESS Owner shall file the Maintenance Plan Summary at the same time as it files its Initial Certification. When a GA or ESS Owner acquires a GA or ESS from an existing GA or ESS Owner, the new owner shall file its Maintenance Plan Summary at the same time it files its Initial Certification.

6.3.2.3 UPDATES FOR ASSETS IN ACTIVE SERVICE

The Maintenance Plan Summary shall be updated and refilled with SED every other year pursuant to a schedule to be determined by SED.

6.4 EXEMPTION

GAs or ESSs smaller than 50 megawatts are exempt from the entirety of Section 6.0. Each facility's capacity shall be determined by summing the nameplate capacities of all units of the GA and/or ESS of the facility utilizing the same meter. Notwithstanding this exemption, GAs or ESSs one megawatt or larger but smaller than 50 megawatts are required to observe the following requirements:

- 6.4.1 Each facility shall be operated in a safe, reliable, and efficient manner that reasonably protects the public health and safety of California residents, businesses, and the community;
- 6.4.2 Each facility shall be operated so as to be reasonably available to meet the demand for electricity, and promote electric supply system reliability, in a manner consistent with prudent industry practice; and
- 6.4.3 Each facility shall be operated in a reasonable and prudent manner consistent with industry standards while satisfying the legislative finding that each facility is an essential facility providing a critical and essential good to the California public.

7.0 GENERATING ASSET AND ENERGY STORAGE SYSTEM OPERATION STANDARDS

7.1 APPLICABILITY OF STANDARDS

All GA or ESS Owners shall operate their Generating Assets and ESSs in compliance with the GA and ESS Operation Standards.

7.2 OPERATION PLAN

7.2.1 CONTENTS

An Operation Plan is a paper or electronic document that shows how the GA or ESS Owner's operation practices and policies comply with each Operation Standard for each GA or ESSs. The Operation Plan may be in the form of a narrative, index, spreadsheet, database, web site, or other. The Operation Plan shall specifically identify the procedures and criteria that are used to comply with each Operation Standard. Existing equipment manuals, checklists, warranty requirements, and other documents may be identified to demonstrate compliance. If any of these documents are contradictory, the Operation Plan should resolve the contradiction. Where the GA or ESS Owner's operation does not satisfy an Operation Standard, the Operation Plan shall show how and when operation will be brought into compliance.

7.2.2 AVAILABILITY

The current Operation Plan for each GA or ESS will be available for each GA or ESS or, in the case of a plant or facility with multiple GA or ESSs, in the central business office. Upon SED's request, a GA or ESS Owner shall submit the most current copy of the Operation Plan (or requested portion thereof) to SED in the manner specified in subsection 14.2 of this General Order.

7.2.3 INITIAL CERTIFICATION

The GA or ESS Owner shall file an Initial Certification with SED that certifies either:

7.2.3.1 COMPLIANCE

The GA or ESS Owner has adopted and is implementing an Operation Plan that complies with all GA and ESS Operation Standards, or

7.2.3.2 NONCOMPLIANCE

The GA or ESS Owner has (a) identified and documented deficiencies in its operation practices and policies, and (b) adopted a course of corrective actions that is reasonably designed to achieve compliance with the GA and ESS Operation Standards within 180 days of the date of Initial Certification.

7.2.4 FILING DATE FOR INITIAL CERTIFICATION

7.2.4.1 FILING DATE FOR ASSETS IN ACTIVE SERVICE BEFORE THE EFFECTIVE DATE OF GO 167-C

For each GA or ESS In Active Service before the effective date of this General Order, the GAO or ESSO shall file the Initial Certification within 180 days of the effective date.

7.2.4.2 FILING DATE FOR NEW OR ACQUIRED ASSETS

For each GA or ESS placed in Active Service after the effective date of this General Order, the GA or ESS Owner shall file the Initial Certification within 180 days of such effective date of GO 167-C or 90 days of the GA or ESS being placed in Active Service, whichever date is later. When a GA or ESS Owner acquires a GA or ESS from an existing GA or ESS Owner acquires an ESS from an existing Owner, the new owner shall file its Initial Certification within 180 days of the effective date of GO 167-C, 90 days of the effective date of the transfer of title, or within 90 days of the transfer of possession, whichever date is later.

7.3 OPERATION PLAN SUMMARY

7.3.1 CONTENTS

An Operation Plan Summary is a paper or electronic document that summarizes the Operation Plan. It shall summarize how the GA or ESS Owner's operation complies with each Operation Standard. It shall be in the format and include the content elements specified by the Commission's Executive Director. Where the GA or ESS Owner's operation does not satisfy an Operation Standard, the Operation Plan Summary shall summarize how and when operation will be brought into compliance.

7.3.2 FILING DATE

7.3.2.1 FILING DATE FOR ASSETS IN ACTIVE SERVICE BEFORE THE EFFECTIVE DATE OF GO-167-C

Each GA or ESS in Active Service before the effective date of this General Order shall file the Operation Plan Summary at same time as it files its Initial Certification.

7.3.2.2 FILING DATE FOR NEW OR ACQUIRED ASSETS

For each GA or ESS placed in Active Service after the effective date of this General Order, the GA or ESS Owner shall file the Operation Plan Summary at the same time as it files its Initial Certification. When a GA or ESS Owner acquires a GA or ESS from an existing GA or ESS Owner, the new owner shall file its Operation Plan Summary at the same time it files its Initial Certification.

7.3.2.3 UPDATES FOR ASSETS IN ACTIVE SERVICE

For each GA or ESS in Active Service, the GA or ESS Owner shall update the Operation Plan Summary and refile with SED every other year pursuant to a schedule to be determined by SED.

7.4 EXEMPTION

GAs or ESSs smaller than 50 megawatts are exempt from the entirety of Section 7.0. Notwithstanding this exemption, generating assets and Energy Systems one megawatt or larger and smaller than 50 megawatts are required to observe the following requirements:

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- 7.4.1 Each facility shall be operated in a safe, reliable, and efficient manner that reasonably protects the public health and safety of California residents, businesses, and the community;
- 7.4.2 Each facility shall be operated so as to be reasonably available to meet the demand for electricity, and promote electric supply system reliability, in a manner consistent with prudent industry practice; and
- 7.4.3 Each facility shall be operated in a reasonable and prudent manner consistent with industry standards while satisfying the legislative finding that each facility is an essential facility providing a critical and essential good to the California public.

8.0 INDEPENDENT SYSTEM OPERATOR (ISO) OUTAGE COORDINATION PROTOCOL

8.1 COMPLIANCE

All GA and ESS Owners shall comply with the Outage Coordination Protocol adopted by the California Independent System Operator.

9.0 INFORMATION REQUIREMENTS

9.1 PROVISION OF INFORMATION

Upon SED's request, a GA or ESS Owner shall provide information in writing concerning (a) a GA or ESS; (b) the operation or maintenance of the GA or ESS; (c) the Initial Certification, Recertification, Corrective Plan, or Notice of Material Change pertaining to the GA or ESS; (d) any Maintenance, Operation, or Corrective Plans pertaining to the GA or ESS; (e) the design, performance, or history of a GA or ESS; (f) event or outage data concerning a GA or ESS including, but not limited to, unavailability reports or outage cause reports; (g) accounts, books, contracts, memoranda, papers, records, inspection reports of government agencies or other persons; and (h) any other documents or materials. These information requests shall be reasonably related to the requirements of this General Order. If SED has indicated when, where, and in what form the information is to be provided, the GA or ESS Owner will provide the information in that manner and will otherwise cooperate with SED in the provision of information. Except for an exigent circumstance, a minimum of five business days will be provided for the response. If SED determines the existence of an exigent circumstance, SED may establish a shorter response period for information reasonably required for SED to understand or respond to the exigent circumstance.

9.2 AUTHORIZATION FOR RELEASE OF INFORMATION

Upon SED's request, a GA or ESS Owner shall authorize governmental agencies to release and provide directly to SED any information in that agency or entity's possession regarding the operation or maintenance of that GA or ESS Owner's GA or ESS. To the extent such agencies have designated information as confidential, SED will not disclose that information to the public unless (a) SED has been authorized by that agency or entity to disclose the information; (b) the Commission orders or permits disclosure; or (c) a court of competent jurisdiction orders or permits disclosure. Where appropriate, the Commission may enter into a confidentiality agreement with such agency. Upon SED's request, a GA or ESS Owner shall authorize other persons or entities to release and provide directly to SED any information in the possession of that person or entity regarding the operation or maintenance of that GA Owner's GA or ESS Owner's ESS, in which case the GA or ESS Owner may make a claim of confidentiality pursuant to Subsection 14.4 of this General Order.

9.3 GENERATING ASSET AND ENERGY STORAGE SYSTEM INFORMATION

A GA or ESS Owner's obligations to provide or authorize the release of information specified in Subsections 9.1 and 9.2 include, but are not limited by, the following specific requirements concerning GAs and ESSs:

9.3.1 OUTAGE REPORT TO CALIFORNIA INDEPENDENT SYSTEM OPERATOR (CAISO)

As required by Pub. Util. Code § 761.3 (e), each GA or ESS Owner owning or operating a GA or ESS in California shall provide an outage report to the ISO that identifies any periods when the generating or storage facility is unavailable to produce or discharge electricity or is available only at reduced capacity. The report shall also identify the reasons for any such unscheduled unavailability or reduced capacity.

9.3.2 SUBMISSION OF INFORMATION TO NORTH AMERICAN ELECTRIC RELIABILITY CORPORATION (NERC)

Except for Generating Assets or ESSs for which NERC does not accept data, each GA or ESS Owner shall submit design, performance, and event data to NERC for inclusion in GADS. Within the categories of data that NERC accepts, SED may specify the data the GA or ESS Owner must submit to NERC. If requested by SED, a GA or ESS Owner shall concurrently provide

SED with a copy of all data submitted to NERC for inclusion in GADS.

9.3.3 COMPARABLE DATA AVAILABILITY

If upon the effective date of this General Order, a GA or ESS Owner has not submitted design, performance, or event data concerning a GA or ESS to NERC for inclusion in GADS, the GA or ESS Owner shall make available comparable data to SED. Upon SED's request, the GA or ESS Owner shall provide comparable data directly to SED until the GA or ESS Owner begins to submit that information to NERC and the information becomes available to SED.

9.3.4 HISTORICAL INFORMATION

Upon SED's request and for any period after January 1, 1998, a GA or ESS Owner shall provide SED and/or NERC with design, performance, or event data concerning the GA or ESS.

9.3.5 NUCLEAR FACILITY DATA

9.3.5.1 As required by Pub. Util. Code § 761.3(c)(1)(B), each GA Owner who owns or operates a nuclear-powered generating facility shall file with SED an annual schedule of maintenance, including repairs and upgrades, for each generating facility. The annual schedule of maintenance shall be filed with SED by October 15th for the maintenance scheduled for the following calendar year and shall be updated quarterly thereafter on the fifteenth (15th) day of each January, April, and July. The first such schedule shall be filed by October 15, 2005. The filing with SED shall be the same as the filing with the ISO (pursuant to the ISO's Outage Coordination Protocol or other ISO requirement) or, if different, shall clearly indicate that it is different and briefly summarize the differences. The owner or operator of a nuclear-powered generation facility shall make good faith efforts to conduct its maintenance in compliance with its filed plan and shall report to the ISO any significant variations from its filed plan.

9.3.5.2 As required by Pub. Util. Code § 761.3(c)(1)(C), each GA Owner who owns or operates a nuclear-powered generating facility shall report on a monthly basis to

SED all actual planned and unplanned outages of each facility during the preceding month. The report shall be filed with SED by the 10th day of each month for the period covering the immediately prior month (*e.g.*, filed by September 10th for outages in August), with the first report filed by September 10, 2005. The filing with SED shall be the same as the filing with the ISO (pursuant to the ISO's Outage Coordination Protocol, or other ISO requirement) or, if different, shall clearly indicate that it is different and briefly summarize the differences. The owner or operator of a nuclear-powered generating facility shall report on a daily basis to the ISO the daily operational status and availability of each facility.

9.3.6 QUALIFYING FACILITY DATA

Pursuant to Pub. Util. Code § 761.3(c)(2)(B):

- 9.3.6.1 An electrical corporation that has a contract with a qualifying small power production facility, or a qualifying cogeneration facility, with a name plate rating of 10 megawatts or greater, shall report the information specified below (§ 9.3.6.4) to SED. The specified information shall be reported by the electrical corporation only if the information is provided to the electrical corporation by the qualifying facility pursuant to a contract.
- 9.3.6.2 Each qualifying facility with a name plate rating of 10 megawatts or greater shall report the information specified below (§ 9.3.6.4) directly to the ISO if the information is not provided to an electrical corporation by the qualifying facility pursuant to a contract with the electrical corporation.
- 9.3.6.3 Each electrical corporation shall file a report with SED and ISO by the thirty-first (31st) day of March covering the period of the immediately prior calendar year (*e.g.*, January 1 through December 31). The first report shall be filed by March 31, 2006, and be updated annually thereafter on each subsequent thirty-first (31st) day of March. The report shall list each qualifying facility with which the electrical corporation had a contract for

part or all of the prior calendar year. The list shall identify whether or not the information specified below (§ 9.3.6.4) was provided by the qualifying facility to the electrical corporation pursuant to a contract. If so, the electrical corporation shall include the specified information in its report. If not, the electrical corporation need not provide the specified information in its report, but the qualifying facility shall provide the information directly to the ISO. On the same day the report is filed with SED, the electrical corporation shall serve a copy of its report on each qualifying facility which it determines did not provide the specified information pursuant to a contract along with a cover letter. The cover letter shall inform the qualifying facility that the qualifying facility must provide the data specified below (§ 9.3.6.4) directly to the ISO pursuant to Pub. Util. Code § 761.3(c)(2)(B), or pursue the matter with the electrical corporation within 30 days of the date of the letter.

9.3.6.4 Specified Information: The maintenance schedules for each qualifying facility, including all actual planned and unplanned outages of the qualifying facility, and the daily operational status and availability of the qualifying facility.

9.4 SAFETY-RELATED INCIDENTS

Within 24 hours of its occurrence, a GAO or ESSO shall report to the Commission's emergency reporting website any safety-related incident involving a GA or ESS. If internet access is unavailable, the GAO or ESSO may report using the backup telephone system. Such reporting shall include any incident that has resulted in death to a person; an injury or illness to a person requiring overnight hospitalization; a report to Cal/OSHA, OSHA, or other regulatory agency; or damage to the property of the GAO or ESSO or another person of more than \$200,000, or involves a GA or ESS malfunction or failure resulting in fires, explosions, hazardous emissions, or safety related reports to other agencies. The GAO or ESSO shall also report any other incident involving a GA or ESS that has resulted in significant negative media coverage (resulting in a news story or editorial from one media outlet with a circulation or audience of 50,000 or more persons) when the GAO or ESSO has actual knowledge of the media coverage. If not initially provided, a written report also will be submitted within five business days of the incident. The report will include copies of any reports

concerning the incident that have been submitted to other governmental agencies.

10.0 AUDITS, INSPECTIONS, AND INVESTIGATIONS

10.1 GENERAL REQUIREMENT

A GA or ESS Owner shall cooperate with SED during any audit, inspection, or investigation (including but not limited to tests, technical evaluations, and physical access to facilities). An audit, inspection, or investigation may extend to any records pertaining to the specifications, warranties, logbooks, operations, or maintenance of the GA or ESS. GA and ESS Owners as entities subject to ongoing regulation under this General Order, are hereby notified that these audits, inspections, or investigations will occur on a regular, systematic, and recurring basis supplemented as needed by additional audits, inspections, or investigations to ensure compliance with this General Order.

10.2 INTERVIEWS AND TESTIMONY

Upon SED's request, a GA or ESS Owner, its employees, and its contractors shall provide testimony under oath or submit to interviews concerning a GA or ESS, its specifications, warranties, logbooks, operations, or maintenance.

10.3 TESTS AND TECHNICAL EVALUATIONS

Upon SED's request, a GA or ESS Owner shall conduct a test or technical evaluation of a GA or ESS (or shall contract with an auditor, consultant, or other expert, mutually selected by SED and the GA or ESS Owner, to conduct the test or technical evaluation) so as to provide information reasonably necessary for determining compliance with the Standards enforced by this General Order. The GA or ESS Owner will pay all costs and liabilities resulting from such tests or technical evaluations, except for SED's own staff expenses. If a test or technical evaluation may reasonably result in the reduced or suspended generation from a GA or ESS, the GA or ESS Owner shall notify CAISO as soon as the GA or ESS Owner becomes aware of the test or technical evaluation. To the extent feasible, Commission staff shall schedule such tests or evaluations to minimize generation disruptions and shall, as appropriate, coordinate its activities with CAISO.

10.4 PRESERVATION OF RECORDS

A GA or ESS Owner shall retain all records including logbooks, whether in paper or electronic format, concerning the operation and maintenance of a GA or ESS for five years. Any subsequent modification to a record must show the original entry, the modified entry, the date of the modification, the person who made or authorized the modification, and the reason for the modification.

10.5 THIRD-PARTY AUDITS, TESTS, OR TECHNICAL EVALUATIONS

During an audit, test, or technical evaluation conducted under this Section 10.0, a GA or ESS Owner may submit, or authorize access to, audits, contractual or other tests, inspections, or technical evaluations previously performed by government agencies, insurance companies, or other persons or entities. While this third-party information may be relevant to the inquiry, the information may not be sufficient, in and of itself, to demonstrate compliance with the standards. SED will determine whether a third-party audit, test, inspection, or technical evaluation is sufficient for the purposes of this Section 10.0.

11.0 VIOLATIONS

11.1 VIOLATION

A violation is the failure of a GA or ESS Owner to comply with a requirement of this General Order. A GA or ESS Owner's lawful and reasonable assertion of its rights under this General Order or state or federal law will not be considered a failure to cooperate under any provision of this General Order.

11.2 RETALIATION

Any adverse action, as that term has been used and applied under Title VII of the Civil Rights Act, 42 U.S.C. § 2000e *et seq.* or the California Fair Employment and Housing Act, Gov. Code § 12940 *et seq.*, taken by a GA or ESS Owner against an officer, employee, agent, contractor, subcontractor, or customer of a GA or ESS Owner for reporting a Violation of the Standards, reporting a Violation of this General Order, or providing information during the course of an audit, inspection, or investigation is also a Violation of this General Order.

12.0 COMMISSION PROCEEDINGS

12.1 FORMAL ENFORCEMENT PROCEEDINGS

In responding to alleged Violations of this General Order, the Commission may initiate any formal proceeding authorized by the California Constitution, the Pub. Util. Code, other state and federal statutes, court decisions or decrees, the Commission's Rules of Practice and Procedure, or prior Commission decisions or rulings.

12.2 OTHER COMMISSION REMEDIES

In enforcing the provisions of this General Order, the Commission may pursue any other remedy authorized by the California Constitution, the Pub.

Util. Code, other state or federal statutes, court decisions or decrees, or otherwise by law or in equity.

12.3 IMPOSITION OF FINES FOR VIOLATIONS

12.3.1 VIOLATIONS

For Violations of this General Order, the Director of SED and his/her designee may assess a scheduled fine or, in the alternative, proceed with any remedy otherwise available to SED or the Commission. For any violation of this General Order, citations may be issued pursuant to Pub. Util. Code Section 2111 or other applicable authority, following the processes and procedures of the Commission's electric citation program, as set forth in Decision (D.) 14-12-001 as modified by D.16-09-55 and D.18-05-023, or its successor. SED shall notify the GA or ESS Owner, in writing, of any Violations and assessed fines, and shall include notice of the right to contest the fine.

12.3.2 EX PARTE COMMUNICATIONS

From the date that SED issues a citation to and including the date when the final order is issued, neither the GA or ESS Owner, nor SED staff, or any agent or other person acting on behalf of the GA or ESS Owner, or SED, may communicate regarding the appeal, orally or in writing, with a Commissioner, Commissioner's advisor, or Administrative Law Judge, except as expressly permitted under these procedures.

13.0 SANCTIONS

13.1 SANCTIONS

Consistent with prior Commission decisions, the following factors will be considered in determining the sanctions to be imposed against a GA or ESS Owner for violating this General Order:

- 13.1.1 The diligence and reasonableness demonstrated by the GA or ESS Owner in attempting to prevent a Violation, in detecting a Violation, in disclosing a Violation to SED and other requisite government agencies, and in rectifying a Violation;
- 13.1.2 The seriousness of the Violation in terms of injury, if any, to persons, property, and the integrity of the regulatory process;
- 13.1.3 The number and seriousness of any prior Violations;
- 13.1.4 The GA or ESS Owner's financial resources;

- 13.1.5 The totality of the circumstances in furtherance of the public interest; and
- 13.1.6 Commission precedent.

13.2 MITIGATION OF SANCTIONS

The following factors may be considered as mitigation in considering the sanctions to be imposed for violating this General Order:

- 13.2.1 The GA or ESS Owner's demonstrated substantial compliance with any guidelines or other guidance issued by the Committee or the Executive Director concerning the Standards and requirements of this General Order.
- 13.2.2 Conflicting or competing requirements imposed on the GA or ESS Owner by other governmental agencies; warranty requirements; power contract requirements; or requirements imposed by the CAISO, NERC, or the Western Electricity Coordinating Council.
- 13.2.3 Penalties already imposed on the GA or ESS Owner by other governmental agencies, contracts, or other regulatory bodies for the same acts or omissions resulting in Violations of this General Order.
- 13.2.4 The GA or ESS Owner's demonstrated cooperation in assisting the Commission and SED in the enforcement of this General Order.

13.3 ENHANCEMENT OF SANCTIONS

The following enhancing factors may be considered in increasing the sanctions that would otherwise be imposed for violating this General Order:

- 13.3.1 The GA or ESS Owner's demonstrated substantial noncompliance with any guidelines or other guidance issued by SED or the Executive Director concerning the Standards and requirements of this General Order.
- 13.3.2 The GA or ESS Owner's repetitive violations of the Standards, Pub. Util. Code, or this General Order.
- 13.3.3 The GA or ESS Owner's violations of the Standards or this General Order have resulted in the failure to deliver electricity as scheduled by the ISO or in actual power outages.
- 13.3.4 The GA or ESS Owner's failure to report, as required, or cooperate with the Commission and SED in any investigation, audit, inspection, test, or technical evaluation.

- 13.3.5 The GA or ESS Owner's efforts to impede or frustrate SED in the enforcement of this General Order. A GA or ESS Owner's lawful and reasonable assertion of its rights under this General Order or state or federal law will not be used to enhance a sanction.

14.0 MISCELLANEOUS PROVISIONS

14.1 ONGOING REPORTING OBLIGATIONS

14.1.1 PERIODIC RECERTIFICATIONS

For each GA or ESS not exempted under Subsections 4.2, 5.2, 6.4, or 7.4, the GA or ESS Owner shall file a recertification that it continues to maintain logbooks as required under Sections 4.0 or 5.0 of this General Order and continues to implement a Maintenance Plan and an Operation Plan, as described in Sections 6.0. and 7.0. of this General Order, in a manner that complies with the GA and ESS Maintenance Standards and GA and ESS Operation Standards. The recertifications will be filed every other year pursuant to a schedule to be determined by SED.

14.1.2 NOTICE OF MATERIAL CHANGE

A GA or ESS Owner shall notify SED of (a) any previously unreported deficiency in its operation or maintenance practices (including logbook practices); or (b) any correction or amendment to the Initial Certification, Recertification, Maintenance Plan Summary or Operation Plan Summary pertaining to a GA or ESS that is required because of a material change in the operation or maintenance of the GA or ESS. A material change is a modification of the characteristics, operation, or maintenance of a GA or ESS when that change reasonably could be expected to significantly improve or degrade the reliability, output, or performance of the GA or ESS. The GA or ESS Owner shall file a Notice of Material Change within thirty (30) days of the known occurrence of the material change.

14.2 FILINGS AND SUBMISSIONS

All Certifications, Recertifications, Notices, or other submissions of information or data in response to Commission requests and the requirements of this General Order will be filed directly with SED, Electric Safety and Reliability Branch, at 505 Van Ness Avenue., San Francisco, CA 94102. Documents must be received by SED on the day they are due. In addition to or instead of paper filings, SED may require electronic submissions of all filings that can reasonably be created in that format.

14.3 OATH, AFFIRMATION OR VERIFICATION

Each formal filing with the Commission (*i.e.*, Certification, Recertification, Notice, Contest, Maintenance Plan Summary, Operation Plan Summary, Updates of Plan Summaries) will be under the written oath, affirmation, or verification of a corporate officer of the GA or ESS Owner.

14.4 CONFIDENTIALITY

All claims of confidentiality related to the implementation and enforcement of this General Order must be based on the provisions of this subsection.

14.4.1 BURDEN OF ESTABLISHING PRIVILEGE

A GA or ESS Owner has the burden of establishing any privilege that it claims regarding requested documents or information. A GA or ESS Owner has the right to claim an absolute statutory privilege, such as the attorney-client privilege, for information requested. If such a privilege applies, the GA or ESS is not required to provide such information to the Commission. However, the GA or ESS Owner must specify the statutory privilege applicable to particular information. A GA or ESS Owner may also assert a claim of privilege for documents or information provided to the Commission on a confidential basis, such as the trade secret privilege. In such cases, the GA or ESS Owner must assert the specific privilege(s) it believes the GA or ESS Owner and/or the Commission holds and why the document, or portion of document, should be withheld from public disclosure.

14.4.2 CONFIDENTIALITY CLAIMS REQUIRING BALANCING OF INTERESTS

If a confidentiality request is based on a privilege or exemption requiring a balancing of interests for and against disclosure, rather than on a statutory prohibition against disclosure or a privilege held by the GA or ESS Owner, the GA or ESS Owner must demonstrate why the public interest in an open process is clearly outweighed by the need to keep the material confidential. A GA or ESS Owner, which is a public utility, should not cite Pub. Util. Code § 583 as a sole basis for the Commission's nondisclosure of information since, as noted in D.91-12-019, § 583 does not create for a utility any privilege that may be asserted against the Commission's disclosure of information or designate any specific types of documents as confidential.

14.4.3 REQUIREMENTS

A GA or ESS Owner desiring confidential treatment of information provided to the Commission shall at a minimum:

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- 14.4.3.1 Specifically indicate the information that the GA or ESS Owner wishes to be kept confidential, clearly marking each page, or portion of a page, for which confidential treatment is requested.
- 14.4.3.2 Identify the length of time the GA or ESS Owner believes the information should be kept confidential and provide a detailed justification for the proposed length of time. The business sensitivity of information generally declines over time and the balancing of interests for and against disclosure may change accordingly.
- 14.4.3.3 Identify any specific provision of state or federal law the GA or ESS Owner believes prohibits disclosure of the information for which it seeks confidential treatment and explain in detail the applicability of the law to that information.
- 14.4.3.4 Identify any specific privilege the GA or ESS Owner believes it holds and may assert to prevent disclosure of information and explain in detail the applicability of that law to the information for which confidential treatment is requested. For example, if a GA or ESS Owner asserts that information is subject to a trade secret privilege (Evidence Code § 1060 *et seq.*, the GA or ESS Owner must explain how the information fits the definition of a trade secret (*e.g.*, how the information provides the holder with economic value by virtue of its not being generally known to the public and what steps the GA or ESS Owner has taken to maintain the secrecy of the information.
- 14.4.3.5 Identify any specific privilege the GA or ESS Owner believes the Commission holds and may assert to prevent disclosure of information and explain in detail the applicability of that privilege to the information for which confidential treatment is requested. For example, if the privilege is one that involves a balancing of public interests for and against disclosure, such as the official information privilege in Evidence Code § 1040(b)(2), the GA or ESS Owner must demonstrate that the information at issue falls within the definition of official information and the Commission's disclosure

of the information is against the public interest because there is a necessity for preserving the confidentiality of the information that outweighs the necessity for disclosure in the interest of justice.

14.4.3.6 State whether the GA or ESS Owner would object if the information were disclosed in an aggregated format.

14.4.3.7 State whether and how the GA or ESS Owner keeps the information confidential and whether the information has ever been disclosed to a person other than an employee of the GA or ESS Owner.

14.4.4 DURATION OF CONFIDENTIALITY CLAIMS

A confidentiality claim, whether or not specifically acted upon by the Commission, expires on the earliest of the following dates: (a) at the end of the period specified by the GA or ESS Owner pursuant to Subsection 14.4.3.2; (b) at the end of a period specified in a specific Commission ruling or decision; or (c) two years after the claim was first asserted before the Commission. To reassert the confidentiality claim, the GA or ESS Owner must again satisfy the requirements of this Subsection 14.4 before the end of the confidentiality period. Staff may disclose information provided under a claim of confidentiality if the Commission has already authorized disclosure of that class of information.

14.5 DISCLOSURE TO OTHER AGENCIES

If the Commission provides any information to another governmental agency (whether in response to a request, subpoena, or on the Commission's own initiative), the Commission will ensure that the information is accompanied with a copy of any confidentiality claim that has been submitted pursuant to Subsection 14.4 of this General Order. Where appropriate, the Commission may enter into a confidentiality agreement with the other governmental agency. When the Commission obtains information indicating a possible violation of any federal, state, or local law, the Commission may provide that information to the appropriate governmental agency. Even though a claim of confidentiality has been made, the claim of confidentiality will not prevent the Commission from providing that information to the appropriate governmental agency.

14.6 COMPLIANCE WITH OTHER LAWS

Pursuant to California Pub. Util. Code § 761.3(d), enforcement of any Standard will not modify, delay, or abrogate any deadline, standard, rule or regulation that is adopted by a federal, state, or local agency for the

purposes of protecting public health or the environment including, but not limited to, any requirements imposed by the California Air Resources Board, an air pollution control district, or an air quality management district pursuant to Division 26 (commencing with section 39000) of the California Health and Safety Code.

14.7 DURATION OF STANDARDS

The Standards, as on file with the Commission will remain effective and enforceable by the Commission under this General Order. The Commission may amend the Standards in a rulemaking proceeding and enforce the Standards as amended, all in exercise of its responsibilities under the California Constitution, Pub. Util. Code, and this General Order.

14.8 EXTENSION OF TIME

For good cause shown, a GA or ESS Owner may request the extension of any deadline established in or pursuant to this General Order. The request must be in writing and submitted in advance of the deadline to the Executive Director or the Executive Director's designee. Pursuant to the request, the Executive Director may grant one or more extensions, if the Executive Director determines that a good and sufficient reason exists for the extension. The extension will specifically indicate its duration.

14.9 GUIDANCE

The Executive Director may promulgate forms, instructions, advisories, and other guidance to GA and ESS Owners aiding them in achieving compliance with this General Order.

14.10 SEVERABILITY

If a court of competent jurisdiction determines that any provision of this General Order is void or unenforceable, the Commission will continue to enforce the remainder of the General Order without reference to the void or unenforceable provision.

14.11 EFFECTIVE DATE

This General Order is effective on the third day following the mailing of the Commission's decision adopting this General Order. The initial Commission decision adopting this General Order was mailed on May 7, 2004, and the General Order became effective May 10, 2004. Changes to this General Order are effective immediately. This includes changes regarding Section 1.0 (Purpose), 2.0 (Definition/Acronyms), 3.0 (Required Compliance), Hydroelectric Energy Logbook Standards (Section 5.0 and Appendix B), 8.0 Independent System Operation (ISO) Outage Coordination Protocol, 9.0 (Information Requirements), 10.0 (Audits, Inspections, and Investigations), 11.0 (Violations, 12.0 (Commission Proceedings), 130. (Sanctions), and 14.0 (Miscellaneous

Provisions). GA and ESS Maintenance Standards and GA and ESS Operation Standards (Sections 6.0, 7.0, Appendix C and Appendix D are also effective immediately.

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APPENDIX A
GENERATING ASSET AND
ENERGY STORAGE SYSTEM LOGBOOK STANDARDS

I. PURPOSE

The intent of this document is to define the requirements for facility logs for plants generating electricity by the use of thermal, solar, wind, geothermal energy, and energy storage systems.

II. GENERAL REQUIREMENTS

Each generating or energy storage facility shall maintain a Control Operator Log that contains the chronological history of the facility including detailed entries regarding the operations and maintenance of the facility. Where information is unit specific, information for each unit must be recorded and so identified.

The Control Operator Log is a formal record of real time operating events as well as the overall status of the GAs, ESSs, and auxiliary equipment under the purview of the Control Room Operator. The log shall also contain an accurate and concise record of important and/or unusual events involving operations, maintenance, water chemistry, safety, accidents affecting personnel, fires, contractor activities, environmental matters, and any other pertinent information concerning the operation of the facility. The log shall also record communications between the facility and outside entities including but not limited to the Independent System Operator (ISO), scheduling coordinators or headquarters facilities, regulators, environmental agencies, Cal OSHA, emergency responders or other agencies. The log shall be maintained notwithstanding and in addition to any other similar requirements that mandate that events be recorded. The Generating Asset Owner (GAO) or Energy Storage System Owner (ESSO) must collect and record all information specified in these standards. All such information must be readily available to operators, California Public Utilities Commission staff, and other authorized personnel at all times.

Notwithstanding the above, generators and energy storage resources may elect to record certain kinds of information in separate logs, as authorized by Exception 1, Exception 2, or Exception 3 below. The information specified in Exception 1 may be recorded in an Equipment Out of Service Log. Similarly, the information specified in Exception 2 may be recorded in a Work Authorization log. The information specified in Exception 3 may be recorded in the Work Order Management system or electronic database system for maintenance activities including corrective, preventive, and predictive maintenance. Information recorded in these separate logs need not be recorded in the Control Operator log.

All required logs entries shall be retained in hard copy, electronic format, or both for a minimum period of five (5) years from the date of the log entry. Each log entry shall start by recording the time of the event. The GAO or ESSO is responsible for maintaining the integrity of the generating asset or Energy Storage System facility logs.

III. LOGBOOK REQUIREMENTS

A. Thermal Generating Facilities

Each facility must record a Facility Status Entry at least once each calendar day. If practicable, the control operator shall make that entry at midnight; however, a facility may for operational reasons elect to make that entry at another time. In any case, the Facility Status Entry must be made at the same time each day, except when emergency conditions require a postponement. In the case of such emergency conditions, the entry for that day shall be made as soon as it is safe to do so.

Information in the Facility Status Entry shall include as applicable:

- 1) Unit status, if on-line, including:
 - Current megawatt (MW) load;
 - Generator Voltage (kV) and MVAR readings;
 - Fuel type and availability;
 - Dispatch instruction records;
 - For units equipped with Automatic Generation Control (AGC) or Automatic Dispatch System (ADS), the status of AGC or ADS equipment, including the availability of AGC or ADS, its operational status (on or off), and the normal range of output possible when the unit is operating under AGC or ADS;
 - Condenser water box differential pressures, condenser back pressure/vacuum readings, boiler, and pre-boiler water chemistry readings (if applicable); and
 - Status of environmental monitoring equipment.
- 2) Any unit MW output outages or restrictions (derates) including, but not limited to, reasons for and expected time/date of release (including the ISO outage ID number).
- 3) Status of any environmental constraints such as, but not limited to, total annual NOx allowable emissions vs. year-to-date total emissions or, for peaker plants, total allowable run time vs. current year to date actual run time.
- 4) Equipment out of service, including any equipment that has been isolated and prepared for an upcoming work authorization with particular emphasis on redundant equipment that if the primary equipment fails, will result in a load restriction or a unit trip (*see* Exception 1).
- 5) Any abnormal operating conditions.

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- 6) Outstanding work authorizations which may be commonly referred to as clearances (*see* Exception 2) and outstanding maintenance activities (*see* Exception 3).
- 7) Status of any retention/waste basins.
- 8) Status of any water conditioning equipment such as facility demineralizers and in stream demineralizers.
- 9) The on-hand quantities of large consumables including distilled water, hydrogen, nitrogen and hypochlorite, if applicable.
- 10) Any other pertinent information regarding the status and reliability of the facility.

The first entry in the Control Operator Log at the start of a shift shall identify each operator on that shift and by some regular means distinguish his/her responsibilities (list in a regular order the identity of the Shift Supervisor(s), Control Operator(s), Assistant Control Operator(s) and Plant or Facility Equipment Operator(s)). This initial entry shall indicate that the crew has ascertained the plant or facility status through the shift turnover, review of the log and a check of the indications and alarms in the control room.

Events shall be logged chronologically as they occur. Significant entries will include the control operator's name at the end of the entry preceded by the name(s) of others involved in the activity.

The events recorded in the Control Operator log shall include, but are not limited to, the following:

- 1) Any changes to facility MW output (except when on AGC and ADS). The current load of the unit shall be recorded as well as the new target load and the reason for the load change including:
 - a) As directed by the day ahead schedule;
 - b) Deviations from the schedule as directed by a scheduling coordinator;
 - c) Load reductions for scheduled equipment outages (cleaning condensers, pump repairs, etc.);
 - d) ISO directions;
 - e) Unplanned unit equipment problems (forced derates) including load restrictions for environmental causes;
 - f) Reducing to minimum load; and
 - g) Any other reason.
- 2) Starting and stopping of equipment and any associated abnormal conditions.
- 3) Significant operations and milestones in the process of major operations such as start-ups, shutdowns, and heat-treats.

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- 4) During a unit start up, once on-line, each facility load increment released to the scheduling coordinator.
- 5) Each instance where a unit is placed on or removed from AGC, including a notation if the AGC limits are set for a different value than the normal AGC range for that unit.
- 6) Any changes to the future schedule for facility output.
- 7) Detailed account of unit trips including any known or suspected causes and remedial action taken.
- 8) Load limit position anytime it is placed at any value less than full load and reason for such action.
- 9) All operating information that affects, efficient, safe, and reliable operation, such as, but not limited to, pressure, temperature, volumetric flow, level, vibration, speed, amperage, and voltage.
- 10) Information regarding a derate related to weather.
- 11) All information related to planned outages or derates, including but not limited to communications with scheduling coordinators, headquarters, or the ISO regarding such outages (including requests to take an outage; and notification to the facility that such outages have been approved or denied), the nature of the work to be completed during the outage, initial and revised return-to-service dates, completion of milestones in such work, requests to the ISO or others for extension of such outages including the reason for that extension, and completion of such outages. All entries shall include the date, time, duration, reason or explanation and the identities of all involved.
- 12) All information related to forced outages or derates, including but not limited to communications with scheduling coordinators, headquarters, or the ISO regarding such outages; the nature of the problem; progress reports on further diagnosis of the problem or on ongoing repairs; estimated and revised return-to-service dates; the nature of any extended work to be completed during the outage; completion of milestones in such work; and completion of such outages. All entries shall include the date, time, duration, reason or explanation and the identities of all involved.
- 13) All work authorizations issued and released and the reason for such work.
- 14) Equipment placed in a not normal status.
- 15) Equipment declared out of service (OOS) including date and time of the initial OOS declaration.
- 16) Any current or potential fuel-supply problems.
- 17) Results of performance tests including, but not limited to, hotwell drop tests, turbine stop valve tests, DC lube oil pump test.

- 18) Equipment outages of environmentally sensitive equipment or environmental monitoring devices.
- 19) All out-of-limit water chemistry conditions including duration and remedial actions, as well as all boiler chemical feeds and boiler drum blowdowns where applicable.
- 20) Changes in equipment/systems' normal operating status such as, but not limited to, a suspected boiler tube leak, fouled condensers, a feedwater heater tube leak, excessive vibration, or overheating.
- 21) Detailed information regarding environmental limitations exceeded, including the date, time, duration, amount, and any known or suspected cause.
- 22) Detailed reports of observations related to transmission system or facility trouble involving frequency or voltage deviations.
- 23) Report of any industrial accident including all details of the incident and the names of all parties involved.
- 24) All other pertinent information concerning the operation of the facility including names of all individuals involved.

B. Renewable Generating Assets and Energy Storage Systems

Each GAO or ESSO must establish written protocols of logbook requirements for each facility (or "site") that address the facility's specific operating characteristics, which may be controlled by remote operating centers. A facility may be comprised of multiple units. An energy storage unit is one or more devices assembled together to store electrical energy and supply electrical energy selected loads at a future time. The GAO or ESSO logbook protocols should define logbook content and how frequently information should be recorded for safe and reliable operation. The protocol must specify all requirements in Appendix A, Section II: General Requirements.

1) Renewable Generating Assets and Energy Storage Systems Control Operator Log Requirements

The Control Operator Log consists of the facility status entry and the event entries and can be recorded by the facility operator and/or the remote operation center operator. The facility operator monitors and controls the operation of each GA and/or ESS facility. The remote operating center operator may monitor and control multiple facilities of renewable GAs and ESSs.

Each facility must record a Facility Status Entry in the Control Operator Log at least once each calendar day. The Facility Status must be made at the same time each day, except when emergency conditions require postponement. In the case of such emergency conditions, the entry for that day shall be made as soon as it is safe to do so.

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The first entry in the Control Operator Log at the start of a shift shall identify each operator on that shift and by some regular means distinguish his/her responsibilities (list in a regular order the identity of the Shift Supervisor(s), Control Operator(s), Assistant Control Operator(s), and any other operation staff. This initial entry shall indicate that the crew has ascertained the plant or facility status through the shift turnover, review of the log, and a check of the indication and alarms in the control room.

Information in the Facility Status Entry shall include as applicable:

- a) Facility status, including:
 - Current power (MW) and/or energy output (MWh);
 - Available capacity of the facility;
 - GA or ESS Voltage (kV) and VAR readings;
 - Dispatch instruction records;
 - For facilities equipped with AGC or ADS, the status of AGC or ADS equipment, including the availability of AGC or ADS, its operational status (on or off), and the normal range of output possible when the facility is operating under AGC or ADS; and
 - Status of environmental monitoring equipment.
- b) Any facility (or site) MW output outages or restrictions (derates) including, but not limited to, reasons for and expected time/date of release (including the ISO outage ID number);
- c) status of any environmental constraints such as, but not limited to, weather information or conditions, temperature, ambient derates, etc.;
- d) Equipment out of service, including any equipment that has been isolated and prepared for an upcoming work authorization with particular emphasis on redundant equipment that if the primary equipment fails, will result in a load restriction or outage a facility trip (*See Exception 1*);
- e) Any abnormal operating conditions affecting efficient, safe, or reliable operation;
- f) Changes in equipment/systems' normal operating status such as, but not limited to, HVAC malfunction, leaks, equipment faults, connection/disconnection of equipment, loss of communications, triggered alarms, high equipment temperature alarms, equipment reset, etc.;
- g) Outstanding work authorization which may be commonly referred to as clearances (*See Exception 2*);
- h) For the ESS and not limited to:

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- i. Current charge and discharge capacity of the systems MW; and
 - ii. State of energy such as maximum usable energy the ESS can be charged or discharged (MWh); and charging/discharging status
- i) Any other pertinent information regarding the status and reliability of the facility.

Event entries shall be logged chronologically as they occur. Significant entries will include the control operators' name at the end of the entry preceded by the name(s) of others involved in the activity.

The events recorded in the Control Operator Log shall include, but are not limited to, the following:

- a) Any changes to the facility MW output (except when on AGC and ADS). The current load of the facility (or sites) shall be recorded as well as the new target load and the reason for the load change including:
 - i. As directed by the day ahead schedule;
 - ii. Deviations from the schedule as directed by a scheduling coordinator;
 - iii. Load reduction for scheduled equipment outages;
 - iv. ISO directions;
 - v. Unplanned facility equipment problems (forced derates) including load restrictions for environmental causes;
 - vi. Reducing to minimum load; and
 - vii. Any other reason.
- b) Significant operations and milestones in the process of major operations such as start-ups, shutdowns, and derates;
- c) Each instance where a facility is placed on or removed from AGC, including a notation if the AGC, limits are set for a different value than the normal AGC, and the normal AGC range for those facilities;
- d) Any changes to the future schedule for facility output;
- e) Detailed accounts of significant equipment trips including any known or suspected causes and remedial actions taken;
- f) Load limit position any time it is placed at any value less than full load and reason for such actions;
- g) Abnormal operating issues on parameters affecting efficient, safe, and reliable operation;
- h) All information related to forced outages or derates, including but not limited to, communications with scheduling coordinators,

headquarters, or the ISO regarding such outages, the nature of the problem; progress reports on further diagnosis of the problem or on ongoing repairs; estimated and revised return-to-service dates, the nature of any extended work to be completed during the outages; completion of milestones in such work; and the completion of such outages. All entries shall include the date, time, duration, reason or explanation and the identities of all involved;

- i) All work authorizations issued and the reason for such work;
- j) Equipment placed in a not normal status;
- k) Equipment declared OOS including date and time of the initial OOS declaration;
- l) Any current or potential energy source problems for ESS, an energy source may be electricity from the grid or a co-located or hybrid photovoltaic (PV), wind, or other electric generator;
- m) Equipment outages of environmentally sensitive equipment or environmental monitoring devices. Environmentally sensitive equipment are components which are easily affected by external factors, such as weather conditions and/or atmospheric pollutants. These types of equipment can not only be impacted by these factors, but also pose a potential risk to the nearby environment and operations if it fails or is damaged;
- n) The functional status of communication systems and supervisory Control Data Acquisition (SCADA) systems;
- o) Record communication with internal and external entities;
- p) Detailed information regarding environmental limitations exceeded, including the date, time, duration, amount, and any known or suspected cause;
- q) Detailed reports of observations related to transmission system or facility trouble involving frequency or voltage deviations;
- r) Report of any industrial accident including all details of the incident and the names of all parties involved; and
- s) All other pertinent information concerning the operation of the facility including names of all individuals involved.

C. Exceptions

- 1) In lieu of logging equipment out of service (OOS) information in the facility status entry, an Equipment OOS Log may be utilized, at the discretion of the GAO or ESSO, to track equipment declared out of service. The work authorization program is intended to provide a safe work environment for current maintenance activities. If a delay is encountered in the repair process, the work authorization should be released, and the equipment declared OOS. If the OOS designation is

expected to be of short duration (five days or less), the OOS entry should be carried forward in the facility status Control Operator Log entry. If a longer period is anticipated, the OOS entry can be recorded in the OOS log to avoid carrying it forward repeatedly in the Control Operator Log. Information in the Equipment OOS Log shall include the following:

- Equipment description;
- Date declared OOS;
- Reason for being declared OOS;
- Estimated time for equipment to return to service;
- Name of person declaring equipment OOS;
- Maintenance order number or similar tracking mechanism;
- Contact person(s); and
- Date equipment returned to service.

2) In lieu of logging outstanding work authorizations in the plant status entry, a Work Authorization Logbook may be utilized, at the discretion of the GAO or ESSO, during periods of construction, overhauls, or major work; and contains work authorizations, commonly referred to as clearances issued, released, and associated with the special activity. All other entries pertaining to the special activity shall be entered in the Control Operator Log. Work authorization log entries do not need to be carried forward for each facility status but may remain for the duration of the special activity. Information in the Work Authorization Log shall include the following:

- Date and time the clearance was issued;
- Name of the Control Operator or Assistant Control Operator issuing the clearance;
- Identification of clearance; and
- Name of person the clearance is issued to.

3) In lieu of logging outstanding maintenance activities, a work order management system or electronic database system may be utilized at the discretion of the GAO or ESSO to track maintenance activities and status. This method of recordkeeping is intended to keep track of maintenance records according to maintenance requirements of original equipment manufacturers or industry best practices. Information in the work order management shall include the following but is not limited to:

- Equipment issue;
- Work order tracking number;
- Date and time the work order was issued and completed;

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- Names of persons who created, approved work orders and performed the work;
- Maintenance requirement (e.g., OEM recommendation, Non-Destructive Examination, Post heat treatment, etc.);
- Maintenance activities performed;
- Parts and tools information;
- Job safety and environmental analysis information; and
- Permit information such as hot work, confined space entry, etc.

IV. GENERATING ASSETS AND ENERGY STORAGE SYSTEMS TO WHICH THESE STANDARDS ARE APPLICABLE

Generating Asset and Energy Storage System Logbook Standards are applicable to each facility that generates electric energy by the use of thermal, wind, solar, or other resources or stored energy owned by an electrical corporation or is located in California that is 50 MW or larger. GA and ESS Logbook Standards are not applicable in the following cases (*see* California Pub. Util. Code §§ 761.3 (c)(1)(A)761.3 (c)(2)(A).

- 1) Nuclear-powered generating facilities that are federally regulated and subject to standards developed by the Nuclear Regulatory Commission, and that participate as members of the Institute of Nuclear Power Operations.
- 2) Qualifying small power production facilities or qualifying cogeneration facilities within the meaning of §§ 201 and 210 of Title 11 of the federal Public Utility Regulatory Policies Act of 1978 (16 U.S.C. Secs. 796(17), 796(18), and 824a-3), and the regulations adopted pursuant to those sections by the Federal Energy Regulatory Commission (18 C.F.R. Secs. 292.101 to 292.602, inclusive).
- 3) Generation units installed, operated, and maintained at a customer site, exclusively to serve that customer's load. For the purposes of this General Order, ESS does not include distributed storage systems owned by individual Load Serving Entity (LSE) customers.
- 4) Facilities owned by a local publicly owned electric utility.
- 5) Any public agency that may generate electricity incidental to the provision of water or wastewater treatment.
- 6) Facilities owned by a city and county operating as a public utility, furnishing electric service as provided in California Pub. Util. Code § 10001.

Electrical corporation does not include electric plant:

- a) Where electricity is generated on or distributed by the producer through private property solely for its own use or the use of its tenants and not for sale or transmission to others (California Pub. Util. Code § 218(a)),

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- b) Employing cogeneration technology or producing power from other than a conventional power source solely for one or more of three named purposes (California Pub. Util. Code § 218(b)),
- c) Employing landfill gas technology for one or more of three named purposes (California Pub. Util. Code § 218(c)),
- d) Employing digester gas technology for one or more of three named purposes (California Pub. Util. Code § 218(d)), and
- e) Employing cogeneration technology or producing power from other than a conventional power source for the generation of electricity that physically produced electricity prior to January 1, 1989, and furnished that electricity to immediately adjacent real property for use thereon prior to January 1, 1989 (California Pub. Util. Code § 218(f)).

(END OF APPENDIX A)

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APPENDIX B
HYDROELECTRIC ENERGY LOGBOOK STANDARDS

I. PURPOSE

The intent of this document is to define requirements for operation logs for attended and unattended hydroelectric generating facilities. These standards are intended to ensure that operating information associated with normal operation, maintenance, and abnormal activities are properly recorded and available for review and analysis by regulatory agencies.

II. GENERAL

Owners of hydroelectric generating facilities shall maintain logbooks or other data collection systems that contain the chronological, real-time operational history of the facilities. Logbooks shall include accurate and concise entries regarding the operations and maintenance of the facility and overall status of the generating units and auxiliary equipment. Logbooks shall be maintained at attended facilities, control centers for unattended facilities, and unattended facilities, as described more fully below.

Logbooks shall include, as appropriate, entries of important and/or unusual events relating to safety, accidents, environmental matters, and any other information pertinent to operations. Where information is unit specific, information for each unit must be recorded and so identified. Logbooks shall also contain entries noting operations and maintenance communications between the facility operator and outside entities, including but not limited to the Independent System Operator (ISO), scheduling coordinators or headquarters facilities, regulators, environmental agencies, CalOSHA or similar agencies. The logbooks shall be maintained notwithstanding and in addition to any other similar requirements that mandate that events be recorded.

Owners of hydroelectric generating facilities must collect and record, either through automated data collection systems, written logbooks, or both, all information specified in this standard. Such information must be readily available to operators, California Public Utilities Commission staff, and other authorized personnel at all times, and must be kept for a minimum period of five years from the date of collection. The owner of the hydroelectric facility is responsible for maintaining the integrity of the information collected and recorded. Any corrections to logbook entries shall be made in a manner that preserves the legibility or integrity of the original entry and identifies the date and time of the correction. Each utility (and facility) will maintain a list of any approved abbreviations used by operators in that utility (and that particular facility), along with a definition of each abbreviation.

III. REQUIRED INFORMATION

A. Attended Facilities and Control Centers for Unattended Facilities

Logbooks at attended facilities and control centers for unattended facilities shall be the chronological, real-time record of the operation and maintenance activities that occur either at the attended facility or the unattended facilities within the jurisdiction of the control center, respectively.

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Information collected and recorded by automatic devices may be maintained separately and need not be entered in the logbook itself, provided that the information is available for review and shall be maintained in accordance with the standards set forth herein for the daily operations logbooks.

Each logbook shall consist of accurate, concise entries and shall contain at least the information specified below. To the extent any of the information below is not available to the control center operator, it shall be captured either by automated systems or recorded in the Unattended Facilities Log.

- 1) Orders and other communications received and transmitted by the operator, as appropriate, including but not limited to those from or to the Independent System Operator (ISO); scheduling coordinators, headquarters facilities and/or dispatchers; transmission operating centers; regulators; environmental agencies; CalOSHA; or similar agencies;
- 2) Actions taken by the operator to change load, derate the unit, or take the unit off line;
- 3) Operational data, including power production (load) levels, water flows, the availability and operation of AGC, and any generation limits applicable to AGC operation other than the normal limits specified in the Participating Generator Agreement with the California Independent System Operator;
- 4) Operation of system protection relays;
- 5) Water regulation (*e.g.*, downstream water requirements, FERC license requirements);
- 6) Unit separation and parallel times;
- 7) Clearances/Work authorizations;
- 8) Reporting on and off clearances;
- 9) Start and completion of switching operations;
- 10) The application, removal, moving, or change in location and/or number of grounding devices;
- 11) Site emergency activities; including but not limited to accidents, spills and earthquakes;
- 12) Trouble reports; including but not limited to those involving equipment failures and those from outside persons or entities;
- 13) Daily operations, including unit outages and deratings, Automatic Voltage Regulator/Power System Stabilizer operations, voltage operations, governor operations, and black-start operations, if applicable; and
- 14) Special system setups for hydraulic, mechanical, electrical or pneumatic systems.

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Each entry shall include the time, location and description of event, including, as relevant, the equipment involved, loads and other readings, voltage orders, directed load changes, deviations from generation schedules, weather, annunciator alarms or other indications, relay target information including device number, limitations, notifications, and corrective actions. Entries noting communications between the operator and outside parties shall include the names of the people involved in the communication.

B. Unattended Facilities

Logbooks at unattended facilities shall be the chronological record of operation and maintenance activities that occur when personnel visit an unattended facility. Entries in logbooks at unattended facilities shall be made consecutively and shall include the following information, as applicable:

- 1) Time and date of entry and exit;
- 2) Name(s) of personnel entering/exiting the station;
- 3) Location of event;
- 4) Text description of event/reason for entering station;
- 5) All information pertinent to event, including but not limited to equipment involved, loads and other readings, voltage orders, directed load changes, deviations, weather, annunciator alarms or other indications, relay target information including device number, curtailments, limitations, notifications, corrective actions;
- 6) The application, removal, moving, or change in location and/or number of grounding devices;
- 7) Clearances/Work authorizations.

(END OF APPENDIX B)

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APPENDIX C
MAINTENANCE STANDARDS FOR
GENERATING ASSET AND
ENERGY STORAGE SYSTEM OWNERS

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Maintenance Standards (MS) 1 through 18 apply to each covered generating asset and energy storage system. (See GO 167, §§ 3 and 6.) A separate document containing guidelines may be obtained from the Commission's Safety and Enforcement Division (or successor entity). (See GO 167 § 14.2.) The guidelines are intended to assist each GAO and ESSO in determining how it may comply with these MS.

1. MS 1 – Safety

The protection of life and limb for the work force is paramount. The company behavior ensures that individuals at all levels of the organization consider safety as the overriding priority. This is manifested in decisions and actions based on this priority. The work environment, and the policies and procedures foster such a safety culture, and the attitudes and behaviors of individuals are consistent with the policies and procedures.

2. MS 2 - Organizational Structure and Responsibilities

The organization with responsibility and accountability for establishing and implementing a maintenance strategy to support company objectives for reliable facility operation is clearly defined, communicated, understood, and is effectively implemented. Reporting relationships, control of resources, and individual authorities support and are clearly defined and commensurate with responsibilities.

3. MS 3 – Maintenance Management and Leadership

Maintenance managers establish high standards of performance and align the maintenance organization to effectively implement and control maintenance activities.

4. MS 4 – Problem Resolution and Continuing Improvement

The company values and fosters an environment of continuous improvement, timely and effective problem resolution, and problem prevention. This can be accomplished by applying industry best practices, lessons learned, and proven safety measures for the safety and reliability of both the GA and ESS.

5. MS 5 - Maintenance Personnel Knowledge and Skills

Maintenance personnel are trained and qualified to possess and apply the knowledge and skills needed to perform maintenance activities that support safe and reliable facility operation.

6. MS 6 - Training Support

A systematic approach to training is used to achieve, improve, and maintain a high level of personnel knowledge, skill, and performance.

7. MS 7 – Balance of Maintenance Approach

The maintenance program includes the proper balance of the various approaches to maintenance, *e.g.*, preventive, predictive, or corrective. The approach is adequately documented with consideration of economics and reliability of equipment or components, and their effect on reliable operation of the unit. Operating experience is factored into the program. Maintenance procedures and documents should include the generation and/or ESS equipment, and all components owned and operated by the ESSO/GAO directly connected to the plant. All integral parts of delivering power to the grid (*e.g.* fuel supply systems, electrical switchyards, transmissions lines, control systems, penstocks, flumes, heating and cooling systems, exhaust system, communications systems, etc.) are included.

8. MS 8 – Maintenance Procedures and Documentation

Maintenance procedures and documents are clear and technically accurate, provide appropriate directions, and are used to support safe and reliable facility operation. Procedures must be current to the actual methods being employed to accomplish the task and are comprehensive to ensure reliable energy delivery to the transmission grid.

9. MS 9 – Conduct of Maintenance

Maintenance is conducted in an effective and efficient manner, so equipment performance and material condition effectively support reliable facility operation.

10. MS 10 – Work Management

Work is identified and selected based on priority to maintaining reliable facility operation. Work is planned, scheduled, coordinated, controlled, and supported with resources for safe, timely, and effective completion.

11. MS 11 – Facility Status and Configuration

Station activities are effectively managed, so facility status and configuration are maintained to support safe, reliable, and efficient operation.

12. MS 12 – Spare Parts, Material and Services

Correct parts and materials are in good condition and are available for maintenance activities to support both forced and planned outages. Procurement of services and materials for outages are completed on time to ensure materials will be available without impact to the schedule. Storage of parts and materials support maintaining quality and shelf life of parts and materials.

13. MS 13 - Equipment Performance and Material Condition

Equipment performance and material condition support reliable facility operation.

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This is achieved using a strategy that includes methods to anticipate, prevent, identify, and promptly resolve equipment performance problems, corrosion, and degradation.

14. MS 14 – Engineering and Technical Support

Engineering and technical support activities are conducted such that equipment performance is optimized for reliable facility operation. Engineering and technical support implements industry best practices, lessons learned, proven safety measures, and technical information necessary for the facility to be operated and maintained within the operating parameters defined by facility design.

15. MS 15 – Chemistry Control

Chemistry controls optimize chemical conditions during all phases of facility operation and system non-operational periods.

16. MS 16 – Regulatory Requirements

Regulatory compliance is paramount in the operation of the facility. Each regulatory event is properly identified, reported and appropriate action is taken to prevent recurrence.

17. MS 17 – Equipment History

Maintenance standards or procedures clearly define requirements for equipment history for the systems and equipment, including, what information or data to collect, how to record data, and how the data are to be used.

18. MS 18 – Maintenance Facilities and Equipment

Facilities and equipment are adequate to effectively support maintenance activities.

(END OF APPENDIX C)

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APPENDIX D
OPERATION STANDARDS FOR
GENERATING ASSET AND
ENERGY STORAGE SYSTEM OWNERS

Operating Standards (OS) 1 through 28 apply to each covered GA and ESS. (See GO 167, §§ 3 and 7.) A separate document containing guidelines may be obtained from the Commission's Safety and Enforcement Division (or successor entity). (See GO 167 § 14.2.) The guidelines are intended to assist each GA and ESS owner in determining how it may comply with these OS.

1. OS 1 - Safety

The protection of life and limb for the work force is paramount. GAOs and ESSOs have a comprehensive safety program in place at each site. The company's behavior ensures that personnel at all levels of the organization consider safety as the overriding priority. This is manifested in decisions and actions based on this priority. The work environment and the policies and procedures foster such a safety culture, and the attitudes and behaviors of personnel are consistent with the policies and procedures.

2. OS 2 - Organizational Structure and Responsibilities

The organization with responsibility and accountability for establishing and implementing an operation strategy to support company objectives for reliable facility operation is clearly defined, communicated, understood, and is effectively implemented. Reporting relationships, control of resources, and individual authorities support, are clearly defined, and commensurate with responsibilities.

3. OS 3 - Operations Management and Leadership

Operations management establishes high standards of performance and aligns the operations organization to effectively implement and control operations activities.

4. OS 4 - Problem Resolution and Continuing Improvement

The GAO and ESSO value and foster an environment of continuous improvement and timely and effective problem resolution.

5. OS 5 - Operations Personnel Knowledge and Skills

Operations personnel are trained and qualified to possess and apply the knowledge and skills needed to perform operations activities that support safe and reliable facility operation.

6. OS 6 - Training Support

A systematic approach to training is used to achieve, improve, and maintain a high level of personnel knowledge, skill, and performance. Each GAO and ESSO provides a site-specific training program including on-the-job training, covering operations, including reasonably anticipated abnormal and emergency operations. Personnel are trained to ensure safe and reliable facility operation.

7. OS 7 - Operation Procedures and Documentation

Operation step wise procedures exist for critical systems and the states of those systems are necessary for the operation of the unit including startup, shutdown, charging, discharging, normal operation, failure detection, alarm response, reasonably anticipated abnormal and emergency conditions, and restoration. Operation procedures and documents are clear and technically accurate, provide appropriate directions, and are used to support safe and reliable facility operation. Procedures are current to the actual methods being employed to accomplish the task and are comprehensive to ensure reliable energy delivery to the transmission grid. Procedure shall be reviewed annually to ensure current procedures are up-to-date and OEM recommendations are implemented.

8. OS 8 - Plant Status and Configuration

Facility activities are effectively managed, so the facility status and configuration are maintained to support safe, reliable, and efficient operation.

9. OS 9 - Engineering and Technical Support

Engineering activities are conducted such that equipment performance supports reliable facility operation. Engineering provides the technical information necessary for the facility to be operated and maintained within the operating parameters defined by facility design. Software is up-to-date for cyber security and routinely backed up for safety, reliability, and operational purposes. Engineering and technical staff provide support, when needed, to operations and maintenance groups to resolve operations and maintenance problems.

10. OS 10 - Environmental Regulatory Requirements

Environmental regulatory compliance is paramount in the operation of the facility. Each regulatory event is identified, reported and appropriate action taken to prevent recurrence.

11. OS 11 - Operations Facilities, Tools, and Equipment

Facilities and equipment are adequate to effectively support operations activities, including housekeeping, tool storage, and equipment storage. Physical separation such as, but not limited to, egress requirements, clearance for electrical equipment, and ESS equipment shall be maintained.

12. OS 12 - Operations Conduct

To ensure safety and optimize facility availability, the facility conducts operations systematically, professionally, and in accordance with approved policies and procedures. The facility takes responsibility for personnel actions, assigns personnel to tasks for which they are trained, and requires personnel to follow

facility and operation procedures and instructions while taking responsibility for safety. Among other things:

- a) All personnel follow approved policies and procedures. Procedures are current and include a course of action to be employed when an adopted procedure is found to be deficient.
- b) All operations are performed in a professional manner. Professional conduct applies throughout the facility site at all times.
- c) All personnel on duty are trained, qualified, and capable of performing their job functions. Personnel are assigned only to duties for which they are properly trained and qualified.
- d) Personnel take immediate actions to prevent or correct unsafe situations. Anyone shall have the right to stop work if they see an unsafe condition.

13. OS 13 - Routine Inspections

Routine inspections by facility personnel ensure that all areas and critical parameters of facility operations are continually monitored, equipment is operating normally, and that routine maintenance is being performed. Results of data collection and monitoring of parameters during routine inspections are utilized to identify and resolve problems, to improve facility operations, and to identify the need for maintenance. All personnel are trained in the routine inspection procedures relevant to their responsibilities. Among other things, each GAO or ESSO creates, maintains, and implements routine inspections by:

- a) Identifying systems and components critical to system operation such as, but not limited to, those listed in the guidelines to Operating Standard 28.
- b) Establishing procedures for routine inspections that define critical parameters of these systems, describe how those parameters are monitored, and delineate what action is taken when parameters meet alert or action levels.
- c) Training personnel to conduct routine inspections.
- d) Monitoring and conducting trend analysis from routine inspections.

14. OS 14 - Clearances

Work is performed on equipment only when safe. When necessary, equipment is taken out of service, de-energized, controlled, and locked-out and/or tagged-out in accordance with a clearance procedure. Personnel are trained in the clearance procedure and its use, and always verify that equipment is safe before any work proceeds. Among other things:

- a) The GA or ESS Owner prepares and maintains a clearance procedure.
- b) The clearance procedure contains requirements for removing a component from service and/or placing a component back into service.
- c) The GA or ESS Owner ensures that personnel are trained in and follow the clearance procedure.

15. OS 15 - Communications and Work Order Meetings

The availability of the GA and/or ESS and safety of personnel is ensured during the execution of work orders by adequate communications and meetings, which may be scheduled or as needed, to review work plans with all affected personnel before work begins. Clear lines of communication exist between personnel responsible for operations, maintenance, and engineering groups. Among other things:

- a) The GAO or ESSO prepares and maintains a procedure for review of work plans through communications and work order meetings at the facility.
- b) Work is analyzed to determine what personnel, components, and systems are affected.
- c) Affected personnel meet before work begins to define the work, identify safety issues, to minimize the impact on facility operation, and to determine the need for further meetings.
- d) Personnel are trained in and follow the procedure.

16. OS 16 - Participation by Operations Personnel in Work Orders

Operations personnel identify potential system and equipment problems and initiate work orders necessary to correct system or equipment problems that may inhibit or prevent facility operations. Operations personnel monitor the progress of work orders affecting operations to ensure timely completion and closeout of the work orders, so that the components and systems are returned to service. Among other things:

- a) Operations personnel identify problems requiring work orders, and initiate work orders to correct those problems.
- b) The operations manager or other appropriate operating personnel periodically review work orders that affect operations to ensure timely completion and closeout of the work orders, so that components and systems are returned to service.
- c) Personnel responsible for prioritizing work orders consult operations personnel to assure that work orders affecting the operations of the plant are properly prioritized.
- d) Appropriate personnel are trained in and follow procedures applicable to work orders.

17. OS 17 - Records of Operation

The GAO or ESSO assures that data, reports, and other records reasonably necessary for ensuring proper operation and monitoring of the GA or ESS are collected by trained personnel and retained for at least five years, and longer if appropriate.

18. OS 18 - Unit Performance Testing

The GAO or ESSO conducts periodic performance tests as appropriate to identify trends and possible improvements in unit operation. The GAO or ESSO responds to test results with changes to equipment, policies, routines, or procedures necessary to maintain unit availability and the unit's ability to support grid operations consistent with the Unit Plan.

19. OS 19 - Emergency Grid Operations

The GAO or ESSO prepares for conditions that may be reasonably anticipated to occur during periods of stress or shortage on the state's electric grid. During such periods of stress or shortage, the GAO or ESSO makes operational decisions to maximize each unit's availability and ability to support grid operations. Among other things the GAO or ESSO:

- a) Takes reasonable steps to maintain the ability to always communicate with the Control Area Operator.
- b) In preparing for periods of stress or shortage, take steps to clarify the regulatory requirements, such as emissions, water discharge temperature, etc., which will apply during emergencies.
- c) When emergencies appear imminent, seeks regulatory relief from those regulatory requirements that reduce output.
- d) Assists the Control Area Operator in responding to the various kinds of possible problems on the electrical grid, including restoration of service after a disturbance.
- e) ESSO prepares for periods of stress or shortage, by ensuring that availability is adequately monitored and maintained.
- f) When practical, during periods of stress or shortage, consults with the Control Area Operator before derating a unit or taking a unit offline and defers outages and derates at the Control Area Operator's request when continued operation is:
 1. Possible and practical;
 2. Safe to facility personnel and to the public;
 3. In accordance with applicable law and regulations; and
 4. Will not cause major damage to the facility.

20. OS 20 - Preparedness for On-Site and Off-Site Emergencies

The GAO or ESSO plans for, prepares for, and responds to reasonably anticipated emergencies on and off the plant site, primarily to protect facility personnel and the public, and secondarily to minimize damage to maintain the reliability and availability of the facility. Among other things, the GAO or ESSO:

- a) Plans for the continuity of management and communications during emergencies, both within and outside the facility;
- b) Trains personnel in the emergency plan periodically;
- c) Ensures provision of emergency information and materials to personnel;
- d) In developing any emergency plans, the GAO and ESSO will coordinate with local emergency management agencies, unified program agencies, and local first response agencies; and
- e) The owner or operator of each ESS facility shall develop and submit an emergency response and emergency action plan for the ESS that complies with Public Utilities Code, Section 761.3, subdivision (g). The owner or operator of the ESS facility shall submit the emergency response and emergency action plan to the county, local emergency management agencies, local first response agencies, and if applicable, the Authority Holding Jurisdiction (AHJ) and the city where the facility is located.

21. OS 21 - Plant Security

To ensure safe and continued operations, each GAO or ESSO provides a prudent level of security for the facility, its personnel, operating information, communications, and stepping up security measures when necessary.

22. OS 22 - Readiness

Until a change in a unit's long-term status, except during necessary maintenance or forced outages, the GAO or ESSO is prepared to operate the unit at full available power if the Control Area Operator so requests, after reasonable notice, when such operation is permitted by law and regulation. Among other things, the GAO or ESSO:

- a) Maintains contingency plans to secure necessary personnel, fuel, and supplies; and
- b) Prepares facilities for reasonably anticipated emergencies.

23. OS 23 - Notification of Changes in Long-Term Status of a Unit

The GAO or ESSO notifies the Commission and the Control Area Operator in writing at least 90 days prior to a change in the long-term status of a unit. The notification includes a description of the planned change.

24. OS 24 - Approval of Changes in Long-Term Status of a Unit

The GAO or ESSO maintains a unit in readiness for service in conformance with Operation Standard 22 unless the Commission, after consultation with the Control Area Operator, affirmatively declares that a generation or ESS facility is unneeded during a specified period of time. This standard is applicable only to the extent

that the regulatory body with relevant ratemaking authority has instituted a mechanism to compensate the GAO or ESSO for readiness services provided.

25. OS 25 - Transfer of Ownership

The GAO or ESSO notifies the Commission and the Control Area Operator in writing at least 90 days prior to any change in ownership.

26. OS 26 - Planning for Long-Term Unit Storage

At least 90 days before a change in the long-term status of an electric generation or ESS unit, other than permanent shutdown and/or decommissioning, the GAO or ESSO shall submit to the Commission plans and procedures for storage, reliable restart, and operation of the unit.

27. OS 27 - Corrosion Control

Where circumstances require it, the GAO or ESSO shall prepare and follow a comprehensive corrosion mitigation and control programs for all types of corruptions to identify vulnerable systems, implement appropriate corrective actions, and preventive measures to maintain facilities with designed performance condition.

28. OS 28 - Equipment and Systems

GAO or ESSO complies with these Operation Standards (1-28) considering the design bases (as defined in the Appendix) of facility equipment and critical systems. The GAO or ESSO considers the design basis of facility equipment when as required by other standards it, among other things:

- a) Establishes procedures for the operation of critical systems at each unit (OS 7);
- b) For each system, identifies critical parameters that require monitoring (OS 8 and 13);
- c) For each critical parameter, establishes value at which to increase observation of the system or take actions to protect it (OS 8 and 13);
- d) Assures that systems are monitored, and actions are taken (OS 8 and 13);
- e) Establishes parameters for operation during periods of stress or shortage on the state's electric grid (OS 9 and 19); and
- f) Assures that personnel operating critical systems are trained and qualified (OS 6).

(END OF APPENDIX D)

APPENDIX E
DEFINITIONS, INDUSTRY CODES,
STANDARDS, AND ORGANIZATIONS
SUMMARY OF ABBREVIATIONS AND ACRONYMS

A. Definitions

Design Basis Documents – Vendor and engineering documents used in the design or used to instruct in the correct operation and maintenance, of the systems and equipment used in the power plant, GA and ESS. Design basis documents consist of OEM Manuals, vendor documents, industry standards, codes, and documented engineering assessments.

Documented deviations from the above documents are also considered part of the design basis documents provided there is documented reasoning for those deviations. Documented reasoning includes the benefit of the deviation and why the deviation is consistent with the Unit Plan.

B. Industry Codes, Standards, and Organizations

ASME Boiler and pressure vessel code, Section 1, (including all amendments)

ASME Boiler and pressure vessel code, Section V111

ANSI/ASME B 31.1 Power Piping

Note on Codes: Any boiler designed and approved to an earlier issue and amendment of these standards is maintained and repaired to the design as originally issued. However, advances in engineering knowledge and experience reflected in the subsequent issues of the codes are taken into consideration in the operation and maintenance of the boiler.

Weld repairs and alterations of boilers designed to ASME Boiler and Pressure Vessel Code, Section 1, is carried out in accordance with the rules of the National Board Inspection Code, published by the National Board of Boiler and Pressure Vessel Inspectors.

These standards are intended to augment the GA and ESS Operation and Maintenance Standards and not conflict with other standards, which are pertinent to specific components and systems at each facility such as standards issued by organizations including but not limited to:

A&WMA	Air & Waste Management Association
AAQS	Ambient Air Quality Standard
ABMA	American Boiler Manufacturer's Association
AMCA	Air Movement and Control Association
ANSI	American National Standards Institute
APCD	Air Pollution Control District
API	American Petroleum Institute
ARB	Air Resources Board (see CARB)
ASHRAE	American Society of Heating, Refrigerating, and Air Conditioning Engineers
ASME	American Society of Mechanical Engineers
ASNT	American Society for Nondestructive Testing

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ASTM	American Society for Testing and Materials
AWS	American Welding Society
CAISO	California Independent System Operator
CAL OSHA	California Occupational Safety and Health Administration
CAPCOA	California Air Pollution Control Officers Association
CARB	California Air Resources Board
CBC	California Building Code
CCR	California Code of Regulations
CEC	California Electrical Code
CEC	California Energy Commission
CFC	California Fire Code
CMC	California Mechanical Code
CPUC	California Public Utilities Commission
CSA	Canadian Standards Association
EPA	Environmental Protection Administration
GAO	Generating Asset Owner
HEI	Heat Exchange Institute
HI	Hydraulic Institute
IBC	International Building Code
IEC	International Electrotechnical Commission
IEEE	Institute of Electrical and Electronics Engineers
IFC	International Fire Code
ISA	The Instrumentation, Systems, and Automation Society
NEC	National Electrical Code
NECA	National Electrical Contractors Association
ISO	International Organization for Standardization
NERC	North American Reliability Corporation
NEMA	National Electrical Manufacturer's Association
NESC, ANSI Standard C2	National Electric Safety Code
NIPC	National Infrastructure Protection Center
NFPA	National Fire Protection Association
NRTL	Nationally Recognized Testing Laboratories
OSHA	Occupational Safety and Health Administration
PFI	Pipe Fabrication Institute
SNL	Sandia National Laboratories
SSPC	Steel Structures Painting Council
TEMA	Tubular Exchanger Manufacturer's Association
UBC	Uniform Building Code
UL	Underwriters Laboratories
UPC	Uniform Plumbing Code

C. Summary of Abbreviations and Acronyms

ACC	Air-Cooled Condenser
ADS	Automatic Dispatch System
AGC	Automatic Generation Control
AOD	Ammonia On Demand
AVG, avg	Average
BACT	Best Available Control Technology
BMS	Burner Management System
BTA	Best Technology Available
BTU, Btu	British Thermal Unit
BCW	Bearing Cooling Water
CA	California
CAM	Compliance Assurance Monitoring
CEMS	Continuous Emissions Monitoring System
CFR	Code of Federal Regulations
CO ₂	Carbon Dioxide
CO	Carbon Monoxide
CT	Combustion Turbine
CTM	Conditional Test Method
CWP, CWS	Circulating Water Pump, Circulating Water System
DC	Direct Current
DLN	Dry Low-NOx
DOD	Battery Depth of Discharge
EAP	Emergency Action Plan
EOH	Equivalent Operating Hour(s)
ERP	Emergency Response Plan
ESRB	Electric Safety and Reliability Branch
ESS	Energy Storage System
ESSO	Energy Storage System Owner
°F & °C	Degree Fahrenheit and Degree Celsius
ft ³	Cubic Feet
GA	Generating Asset
GADS	Generating Availability Data System
GAO	Generation Asset Owner
GO	General Order
gpm	Gallons per minute
H ₂	Hydrogen
H ₂ SO ₄	Sulfuric Acid
HAP	Hazardous Air Pollutant
HHV	Higher Heating Value
HP	Horsepower
HR, hr	Hour
HVAC	Heating, Ventilation, and Air Conditioning

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HVDC	High Voltage Direct Current
Inj.	Injection
ISO	Independent System Operator
kV	Kilovolt
KVA	Kilovolt Amp
kW	Kilowatt
LAER	Lowest Achievable Emission Rate
LEC	Low Emission Combustor
LEL	Lower Explosive Limit
LB, LBs, lbs	Pound, Pounds
Li-Ion	Lithium Ion
MACT	Maximum Achievable Control Technology
MBtu	Million British Thermal Units
MS	Maintenance Standard
MVAR	Megavolt Amp Reactive
MW	Megawatt
MWe	Megawatt Electrical
MWh	Megawatt-hour
NH3	Ammonia
NiCd, NiCad	Nickel Cadmium
Nm	Nanometer
NO	Nitric Oxide
NO2	Nitrogen Dioxide
NOx	Oxides of Nitrogen or Nitrogen Oxides
NPDES	National Pollutant Discharge Elimination Standard
O&M	Operation & Maintenance
O2	Oxygen
OEM	Original Equipment Manufacturer
OMS	Outage Management System
OOS	Out of Service
OS	Operation Standards
Pb	Lead
PbA	Lead Acid
PM	Particulate Matter
PM<10	Particulate Matter (10 microns or less)
PM<2.5	Particulate Matter (2.5 microns or less)
ppm	Parts per Million
ppmvd	Parts per million by volume, dry
PSD	Prevention of Significant Deterioration
QA/QC	Quality Assurance/Quality Control
RATA	Relative Accuracy Test Audit
RA	Resource Adequacy
RMP	Risk Management Plan
S/S	Startup and Shutdown

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SCADA	Supervisory Control and Data Acquisition
SCR	Selective Catalytic Reduction
SED	Safety and Enforcement Division
SNCR	Selective Non-Catalytic Reduction
SO ₂	Sulfur Dioxide
SOC	State of Charge
SOE	State of Energy
SOH	State of Health
SOTA	State-of-the-Art
SO _x	Sulfur Oxides
TDS	Total Dissolved Solids
UPS	Uninterruptible Power Supply
UV	Ultraviolet
V	Volts
VAC	Volts Alternating Current
VDC	Volts Direct Current
VOC	Volatile Organic Compound
Yr	Year
ZAT	Zero Ammonia Technology

(END OF APPENDIX E)

END OF GENERAL ORDER



CSLB Licensing Classifications

Business & Professions Code

Division 3, Chapter 9. Contractors, Article 4. Classifications

7055. For the purpose of classification, the contracting business includes any or all of the following branches:

Print a complete list of the "Description of Classifications" or click the specific classification below for the individual description.

(A) [General Engineering Contractor](#)

(B) [General Building Contractor](#)

(B-2) [Residential Remodeling Contractor](#)

(C) [Specialty Contractor](#)

▶ [C-2 - Insulation and Acoustical Contractor](#)

▶ [C-4 - Boiler, Hot Water Heating and Steam Fitting Contractor](#)

▶ [C-5 - Framing and Rough Carpentry Contractor](#)

▶ [C-6 - Cabinet, Millwork and Finish Carpentry Contractor](#)

▶ [C-7 - Low Voltage Systems Contractor](#)

▶ [C-8 - Concrete Contractor](#)

▶ [C-9 - Drywall Contractor](#)

▶ [C-10 - Electrical Contractor](#)

▶ [C-11 - Elevator Contractor](#)

▶ [C-12 - Earthwork and Paving Contractors](#)

▶ [C-13 - Fencing Contractor](#)

▶ [C-15 - Flooring and Floor Covering Contractors](#)

▶ [C-16 - Fire Protection Contractor](#)

▶ [C-17 - Glazing Contractor](#)

▶ [C-20 - Warm-Air Heating, Ventilating and Air-Conditioning Contractor](#)

▶ [C-21 - Building Moving/Demolition Contractor](#)

▶ [C-22 - Asbestos Abatement Contractor](#)

▶ [C-23 - Ornamental Metal Contractor](#)

▶ [C-27 - Landscaping Contractor](#)

▶ [C-28 - Lock and Security Equipment Contractor](#)

- ▶ [C-29 - Masonry Contractor](#)
- ▶ [C-31 - Construction Zone Traffic Control Contractor](#)
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- ▶ [C-55 - Water Conditioning Contractor](#)
- ▶ [C-57 - Well Drilling Contractor](#)
- ▶ [C-60 - Welding Contractor](#)
- ▶ [C-61 - Limited Specialty](#)

Certifications

Please note: Contractors with an asbestos certification can only perform abatement work within the license classification(s) they already hold. Hazardous substance removal certifications are only issued to contractors who hold an "A", "B", C-12, C-21, C-36, C-57, or C-61/D-40 contractor license. These certifications require a separate application which can be found on the [Forms and Applications](#) page.

- ▶ [ASB - Asbestos Certification](#)
- ▶ [HAZ - Hazardous Substance Removal Certification](#)

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STATE OF CALIFORNIA
DEPARTMENT OF CONSUMER AFFAIRS
CONTRACTORS STATE LICENSE BOARD
INITIAL STATEMENT OF REASONS

Hearing Date: No hearing has been scheduled for the proposed action.

Subject Matter of Proposed Regulations: Battery Energy Storage Systems

Section(s) Affected: Title 16, California Code of Regulations (CCR), Sections 810, 832.10, and 832.46

Specific purpose of, and rationale for, each adoption, amendment, or repeal:

Background and Statement of the Problem:

The Contractors State License Board (CSLB or Board) licenses, regulates, and investigates complaints regarding four different contractor license categories in California, totaling approximately 286,000 licensees (active and inactive status). The four categories are general engineering contracting, general building contracting, residential remodeling contracting, and specialty contracting. (Bus. and Prof. Code (BPC) § 7055.) This rulemaking involves specialty contracting as it relates to the installation of photovoltaic solar energy systems and battery energy storage systems.

The Board enforces and administers the Contractors State License Law (CSLL), BPC section 7000, et seq. BPC section 7008 authorizes the Board to establish necessary rules and regulations for the administration and enforcement of the CSLL. BPC section 7000.6 requires the Board to prioritize public protection in all its licensing, regulatory, and disciplinary functions.

The Board sets the minimum standards for contractor licensing qualifications in California. The Board is authorized to adopt reasonably necessary rules and regulations to effect the classification of contractors in a manner consistent with established usage and procedures as found in the construction business. (BPC § 7059, subd. (a).) The Board may limit the field and scope of the operations of a licensed contractor to those in which they are classified and qualified to engage, as defined by BPC sections 7055, 7056, 7057, and 7058. (*Ibid.*) Consistent with that authority, by regulation, the Board has defined 43 specialty license subclassifications in section 832 of Article 3 of Division 8, Title 16 of the CCR. This proposed regulation affects two of those specialty license classifications: section 832.10, "Class C-10 – Electrical Contractor" and section 832.46, "Class C-46 – Solar Contractor."

Existing law expressly authorizes the C-10 Electrical Contractor and the C-46 Solar Contractor classifications to install photovoltaic solar energy systems (PV systems), as follows:

- An electrical contractor places, installs, erects or connects any electrical wires, fixtures, appliances, apparatus, raceways, conduits, solar photovoltaic cells or any part thereof, which generate, transmit, transform or utilize electrical energy in any form or for any purpose. (CCR, tit. 16, § 832.10.)
- A solar contractor installs, modifies, maintains, and repairs thermal and photovoltaic solar energy systems. A licensee classified in this section shall not undertake or perform building or construction trades, crafts, or skills, except when required to install a thermal or photovoltaic solar energy system. (CCR, tit. 16, § 832.46.)

A PV system is a solar energy system that converts energy from the sun to electricity for an end user. Battery energy storage systems (BESS) are separate electrical systems that can complement PV systems. A BESS can store electrical energy for later use when the PV system is not generating electricity—for example, at night or on cloudy days—or provide backup power during a utility outage. A BESS can be installed initially as part of a PV system installation, added to an existing PV system at a future date, or installed separately to store energy from the power grid without the use of a PV system. With respect to storing energy, individual BESS capacities are measured in kilowatt-hours (kWh), which describes the maximum amount of electricity stored (in hours) when the battery is full.

The pairing of BESS with PV systems has expanded in recent years because of laws and policies furthering California’s clean energy goals and in response to utility outages in California. Senate Bill 100 (De Leon, Chapter 312, Statutes of 2018) requires that, by the year 2045, 100 percent of electric retail sales to end-use customers come from zero-carbon resources and renewable energy (such as solar energy). In addition, the California Energy Commission adopted standards requiring all new homes after 2020 to have PV systems and new commercial buildings and high-rise multi-family buildings after 2022 to have PV systems and BESS capabilities. (Building Energy Efficiency Standards (Energy Code), CCR, tit. 24, Part 6.)

The Board has faced questions about the appropriate specialty license classification(s) to install BESS as between C-10 and C-46 license contractor classifications. There is no dispute that section 832.10 authorizes a C-10 Electrical Contractor to install BESS (because BESS generates, transmits, transforms, and/or utilizes electrical energy, consistent with the existing scope of the C-10 classification). However, the C-46 Solar Contractor classification is limited to work on (thermal and) PV solar energy systems, and section 832.46 does not expressly include BESS.

To the contrary, section 832.46 expressly precludes the C-46 Solar Contractor from performing trades, crafts or skills outside the scope of the classification, unless required

to install a thermal or PV system. Since 2016, the Board has worked with stakeholders to define the circumstances under which a C-46 Solar Contractor may install BESS.

BPC section 7059 similarly permits a specialty contractor (such as a C-10 or C-46) to contract outside of their classification to perform work in the craft or trade of another classification if that work "is incidental and supplemental to the performance of the work in the craft for which the specialty contractor is licensed." Section 831 of Title 16 of the CCR provides such work is "incidental and supplemental" when it is "essential to accomplish the work in which the contractor is classified."

Consistent with these classification restrictions, between February 2016 and April 2018, the Board issued consistent guidance in response to inquiries about which contractor classification(s) may install BESS and under which circumstances. The Board's guidance was a C-10 Electrical Contractor may install BESS either as part of a PV system or as an independent project, and a C-46 Solar Contractor may only install BESS as part of the installation of a PV system.

As far as the Board is aware, C-46 and C-10 contractors have installed PV systems paired with BESS in accordance with these views over the years without demonstrated harm to the public. Nonetheless, the Board's longstanding interpretations of its own regulations have been questioned, and has resulted in several public meetings, hearings, studies, and reports.

In 2018, the Board's Licensing Committee directed CSLB staff to conduct public meetings to determine if any license classifications should be precluded from installing BESS.

From 2018 to 2019, CSLB held several meetings, hosted a two-day public hearing, surveyed building officials, and received written and oral comment on the appropriate classification to install BESS in connection with a PV system or as a standalone project.

In March 2019, Board staff reported its research findings in a report to the Board (March 2019 BESS Report). The Board then directed staff to consider BESS size, complexity, voltage, and potential risks and draft proposed regulatory language to prohibit or restrict certain contractor classifications from performing BESS installations.

From March 2019 through August 2019, board staff conducted additional interviews, collected additional written and oral comments, and held additional stakeholder meetings. On August 6, 2019, the Board's Legislative Committee directed staff to prepare regulatory language to permit the C-46 Solar Contractor to install BESS in specified situations, with the further recommendation that staff study BESS size, complexity, voltage, and risk.

On October 1, 2019, CSLB hosted a public meeting with stakeholders to discuss the August 2019 Legislative Committee recommendation, but stakeholders disagreed about the economic impacts and safety implications of a BESS restriction on C-46 Solar Contractors.

On November 7, 2019, the Board's Legislative Committee Chair recommended staff not prepare regulatory language and instead seek a qualified expert to assist CSLB in its study of BESS issues.

On September 11, 2020, the Board retained University of California, Berkeley (UC Berkeley) as an expert to review BESS information CSLB received to date, perform fact-finding, and provide an analysis regarding BESS installation issues, including safety concerns and the appropriate contractor license classification(s) to install BESS.

In its report issued June 30, 2021, Evaluation of Alternative Contractor License Requirements for Battery Energy Storage Systems (UC Berkeley Report), UC Berkeley recommended CSLB limit the scope of the C-46 Solar Contractor and preclude entirely C-46 license holders from installing BESS. The UC Berkeley Report's findings included:

- CSLB would be encouraging "lower standards and lower requirements" by including C-46 Solar Contractors among the contractors authorized to install BESS as they are not required to employ certified electricians pursuant to Chapter 4.5 (commencing with § 108) of Division 1 of the Labor Code.
- There is not a justifiable threshold by size or sector to suggest less hazard or insignificant risk for BESS installation. While there have been no significant incidents with injury or death, there are data gaps that preclude definitive statements that risks are low.
- The transition costs for entirely precluding C-46 Solar Contractors from installing BESS would be minimal since C-46 Solar Contractors without an additional C-10 license are a small share of all contractors and workers who have installed BESS in California.

On July 27, 2021, UC Berkeley presented its report during a Board meeting. The Board then moved to rescind any prior staff determinations regarding BESS and preclude the C-46 Solar Contractor from installing BESS.

On September 17, 2021, the California Solar and Storage Association filed a verified petition for writ of mandate and complaint for declaratory and injunctive relief against the Board for its July 27, 2021, action. (San Francisco County Superior Court, case no. CGC-21-594911.)

On October 1, 2021, the Board agreed not to enforce its July 27, 2021, decision.

On November 29, 2021, and consistent with the UC Berkeley Report's recommendation, Board staff presented regulatory language to preclude the C-46 Solar Contractor from installing BESS entirely and recommended the Board authorize staff to commence regulatory action. The Board did not accept the recommendation and instead directed staff to gather further stakeholder input and develop alternative language acceptable to both the solar and electrical stakeholders.

From December 2021 to January 2022, Board staff held additional stakeholder meetings. Groups representing C-10 and C-46 contractors agreed any limitation to the C-46 license classification installing BESS should be determined by the kilowatt-hour (kWh) threshold (or energy capacity) of the BESS to be installed.

On March 30, 2022, the Board directed staff to engage an industry expert and develop a report to assist staff with drafting regulatory text reflecting an appropriate kWh threshold for C-46 Solar Contractors to install BESS.

On June 3, 2022, after holding additional stakeholder meetings and contracting with an industry expert to assist with a report, CSLB staff released "Battery Energy Storage Systems, CSLB Staff Report in Consultation with Expert Consultants" (June 2022 Staff Report). The report recommended amending the C-46 classification to expressly permit the installation of BESS up to and including 80 kWh when installed at the same time as a PV system, as incidental and supplemental to the system, pursuant to BPC section 7059. Staff prepared proposed regulatory language to amend sections 810, 832.10, and 832.46 consistent with the June 2022 Staff Report's recommendations.

On June 16, 2022, the Board approved the proposed amendments to sections 810, 832.10, and 832.46 that are the subject of this regulatory proposal.

There are no existing CSLB regulations that define BESS for the purpose of contractor license classifications. There are no CSLB regulations that expressly specify that BESS is not part of a PV system, or when a BESS is "incidental and supplemental" or essential to a specialty contractor's installation of a PV system. This proposal seeks to adopt such regulations.

The proposed text: (1) defines BESS for the purposes of specialty contractor license classifications; (2) specifies that a BESS, as a separate electrical system, is not part of a PV system and is not required to install a PV system; (3) precludes a C-46 Solar Contractor from installing BESS except as specified; and (4) clarifies that installation of a BESS by a C-46 Solar Contractor is incidental and supplemental to the installation of a PV system if the BESS does not exceed a rating of 80 kWh.

More specifically, this proposal would:

- Add a new definition of "battery energy storage system," to section 810, "Definitions," of Article 1, Division 8, of Title 16.

- Add “battery energy storage systems” to the description of the C-10 Electrical Contractor classification in section 832.10, “Class C-10 - Electrical Contractor,” of Article 3, Division 8, of Title 16. The proposal also replaces “solar photovoltaic cells” in section 832.10 with the more accurate “photovoltaic solar energy systems” from current section 832.46.
- Revise the existing section 832.46, “Class C-46 - Solar Contractor,” of Article 3, Division 8, of Title 16, by adding two new paragraphs to establish, for the purposes of the C-46 classification, that:

(1) a BESS, as defined, is not required to install a PV system and shall not be considered within the scope of the C-46 Solar Contractor classification except as specified in the next subdivision; and

(2) the C-46 installation of a BESS is incidental and supplemental to the work of a C-46 Solar Contractor when the BESS is installed at the same time as PV system and the BESS rating does not exceed 80 kWh.

Anticipated benefits from this regulatory action:

Defining BESS and including it within the trade descriptions of the C-10 and C-46 classifications allows CSLB to set a minimum standard for licensure for those specialty contractors who work with this technology. It allows CSLB to require license applicants to demonstrate BESS knowledge and experience and to include information about BESS in the CSLB license examinations. This ensures only those specialty contractors who are qualified to install BESS are licensed, and it prioritizes protection of the public as California advances toward its clean energy goals.

The proposed amendments will eliminate stated confusion about whether BESS is part of a PV system or a standalone electrical device for the purposes of CSLB specialty license classification descriptions. Specifying that BESS is a standalone technology strictly appropriate for the C-10 Electrical Contractor classification – except in clearly defined circumstances when a C-46 Solar Contractor is installing BESS at the same time as a PV system – ensures the Board is appropriately limiting the field and scope of the operations of licensed contractors to those in which they are classified and qualified to engage, as required by BPC section 7059. It further preserves the distinction between the two trades and their workforces.

The proposed amendments will also eliminate stated confusion about which specialty license classification(s) can install BESS paired with PV systems. For the existing C-46 Solar Contractor workforce, the proposed amendments recognize that, although BESS are separate electrical systems, they have become a desirable supplement to PV system installations, and C-46 contractors can perform BESS installations when installing PV systems as part of their trade in specified circumstances. This preserves the practical differences between BESS and PV systems by treating certain BESS installations as out-of-classification work for C-46 contractors at a specified threshold. It

will aid C-46 licensees in knowing and complying with a clear standard and aid the Board in enforcing the standard.

The proposal also benefits the public by clearly defining the BESS installations that require specialized electrical knowledge and skill. By identifying an 80-kWh threshold above which BESS installation is appropriate only for other contractors, the proposal ensures BESS is installed only by those contractors who have met the minimum qualifications, particularly the C-10 Electrical Contractor classification.

Finally, this proposal assures continuation of the businesses of C-46 Solar Contractors who are currently installing PV systems paired with BESS. CSLB recognizes deployment of renewable energy systems in residential and light commercial applications is required by the California Energy Code and is essential for California's clean energy goals. The population primarily affected by this proposal are the small share of contractors holding a C-46 classification and no other license classification that authorizes them to install BESS (i.e., a C-46 holding no C-10, "B", or "A" classification). According to 2020 Interconnection data, this population installed 601 BESS out of 13,073 total projects (4.6% of all projects), with an average BESS size of between 17.82 kWh, based on CSLB's review of 556 BESS, or 19.2 kWh, based on CSLB's review of the raw Interconnection data. (See June 2022 Staff Report, p. 13.) Even using a different data set, the Self-Generation Incentive Program (SGIP) data, between 2015 and 2020, this population installed 1,223 BESS out of 19,194 total projects (6.4% of all projects) with an average BESS size of between 14.04 kWh, based on CSLB's review of 556 BESS, and 17.15 kWh, based on CSLB's review of the raw SGIP data.

In other words, by any measure, C-46 contractors (holding no other license classification authorizing them to install BESS) typically install only a small share of BESS projects, and those projects are usually well under the 80-kWh threshold recommended in this proposal (June 2022 Staff Report). Whereas the UC Berkeley Report and other prior proposed regulatory changes would have precluded the C-46 Solar Contractor classification from installing BESS entirely, this proposal ensures the continuation of the businesses of C-46 Solar Contractors holding no other license classification consistent with the types of installations prevalent in the C-46 marketplace.

Factual Basis/Rationale:

Amend Section 810, Definitions

Subdivision (a)

The Board proposes to adopt subdivision (a) to provide, "For purposes of this division, 'battery energy storage system' means one or more devices, assembled together, capable of storing energy in order to supply electrical energy at a future time."

Purpose:

The purpose of this amendment is to establish a definition of a “battery energy storage system” as the term is used in Division 8 of Title 16 of the Board’s regulations.

Rationale:

The Board derives this definition generally from the definitions of “energy storage systems” in the California Building Standards Codes (CCR, Title 24 or BSC), and specifically from the Residential Code (CCR, tit. 24, Part 2.5, § R202) and the Fire Code (CCR, tit. 24, Part 9, § 202), which both define “energy storage systems” as: “One or more devices, assembled together, capable of storing energy in order to supply electrical energy at a future time.” (See also Cal. Energy Code, CCR, tit. 24, Part 6, § 100.1 [same]; Cal. Electrical Code, CCR, tit. 24, Part 3, § 706.1.) For purposes of the BSC, energy storage systems include battery energy storage systems. (Cal. Electrical Code, CCR, tit. 24, Part 3, § 706.1 [“ESS(s) can include but is not limited to batteries ...”].)

The BSC contains general building design and construction requirements for fire, life, and structural safety. The BSC provides minimum standards to safeguard life or limb, health, property, and public welfare by regulating and controlling the design, construction, quality of materials, use and occupancy, location, and maintenance of all buildings and structures and certain equipment. In developing the BSC, the Building Standards Commission undergoes a 12-to-18-month rulemaking process with contributions from multiple committees and state agencies with public comment periods to develop, propose, and adopt the standards. This is done on a three-year cycle to continually update the BSC with developments in the industry. For these reasons, staff explained in materials for the March 30, 2022, Board meeting that any BESS regulation should be supported by Title 24 and made this recommendation, which the Board in turn approved. In deriving a BESS definition from the Title 24, the Board relies on the BSC as establishing through an informed stakeholder process an appropriate and accurate description of BESS technology as employed in modern-day construction.

Moreover, by using a definition derived from the BSC, which governs the safe construction of buildings and other structures that would have BESS installed, the definition provides a common framework for determining the types of structures and fire safety requirements that C-46 contractors must also consider when installing BESS.

The Board has added the word “battery” to the term “energy storage system” for use in this regulation, even though the word “battery” is not included in the BSC “energy storage systems” definitions, for four reasons.

First, most batteries, in the common understanding of the word, store energy for future use, consistent with the definition proposed.

Second, the June 2022 Staff Report and the UC Berkeley Report found that the BESS systems commonly installed in California are the self-contained, premanufactured

products in the residential and light commercial market, comprised particularly of lithium-ion batteries. These products are marketed as rechargeable “batteries,” and the Board captures this term in the definition because these are the products contractors are predominantly installing.

Third, the definition captures the different ways in which contractors may install BESS. It covers the common practice of installing multiple batteries and connecting them to form a single energy storage system with multiple devices “assembled together.” As a prefix to and descriptor for the term energy storage systems, the word “battery” will describe a single battery or multiple batteries, whichever may be deployed at a single project.

Finally, the definition will also describe the installation of what is referred to as a “battery room” or energy storage closet that is often seen at larger commercial or utility-scale projects. Accordingly, the proposed BESS definition is sufficiently broad to describe the range of activities of licensees installing this technology.

Subdivision (b)

In a newly renumbered subdivision (b), the Board proposes to strike “chapter” and replace it with “division.”

Purpose:

The purpose of this amendment is to redesignate the existing language as subdivision (b) following the newly proposed subdivision (a), and to correctly state the applicability of a defined term “Board.”

Rationale:

The Board renumbers this paragraph as subdivision (b) due to the proposed adoption of a new subdivision (a).

Title 16, Division 8 of the CCR (Contractors State License Board) uses articles and sections and has no chapters. As a result, the use of the word “chapter” in existing section 810 is inaccurate. The Board proposes to replace the term with “division” instead of “article” because there are no other sections in Article 1 where section 810 resides in the CCR.

Amend Section 832.10, Class C-10 – Electrical Contractor

The Board proposes to amend section 832.10 to include within the classification “battery energy storage systems” among the items an electrical contractor may place, install, erect or connect, add “solar energy systems” after the word “photovoltaic,” and delete the word “cells” within the classification description.

Purpose:

The purpose of these amendments is to establish that battery energy storage systems of all sizes and types are within the scope of the C-10 Electrical Contractor classification and to correct the inaccurate reference to “solar photovoltaic cells.”

Rationale:

The Board proposes to expressly add BESS to the C-10 Electrical Contractor description because BESS generate, transmit and utilize electrical energy. Existing section 832.10 provides the C-10 Electrical Contractor’s principal construction business involves things that generate, transmit, transform, or utilize electrical energy. In addition, Article 706 of the California Electrical Code refers to energy storage systems as electric power production sources, i.e., they generate energy. (See CCR, tit. 24, Part 3, § 706.1 [“These systems are primarily intended to store and provide energy during normal operating conditions”].) Things that generate or transmit power, or otherwise utilize electrical energy, are part of the existing description of the section 832.10 electrical contractor classification and are appropriately included in the C-10 Electrical Contractor description.

The Board proposes to add “solar energy systems” after “photovoltaic” for two reasons: (1) PV systems generate, transform, and transmit electrical energy, which makes PV systems appropriately included in the activities described in the existing C-10 description (see Cal. Electrical Code, CCR, tit. 24, Part 3, art. 100 [Photovoltaic systems “convert solar energy into electric energy”], § 690.4 [“Photovoltaic systems shall be permitted to supply a building or other structure in addition to any other electrical supply system(s)”]; and (2) the Board intended the C-10 Electrical Contractor to broadly install photovoltaic technology by adding “photovoltaic” to the regulation in 1982. (See March 2019 BESS Report.)

The Board proposes to move “solar” before “photovoltaic” and strike “cells.” The movement of the word “solar” is non-substantive, and the word “cells” is too limiting to capture all of the PV electrical devices that C-10 contractors may install within the scope of their license. In the context of solar photovoltaic systems, solar “cells” are “[t]he basic PV device that generates electricity when exposed to light.” (Cal. Electrical Code, CCR, tit. 24, Part 3, § 690.1.) C-10 contractors, however, may install the entire PV system, including the cells, so the limiting use of the word “cells” does not accurately reflect the full scope of the C-10 classification’s practice.

These changes will also ensure consistency with the use of “photovoltaic solar energy systems” in the existing C-46 regulation in section 832.46. They will also make the regulation consistent with section 832.46, as the Board removed photovoltaic “cells” from the C-46 regulation in 2009. (See March 2019 BESS Report.)

Amend Section 832.46, Class C-46 – Solar Contractor

Subdivision (a)

The Board proposes to designate the existing language as subdivision (a) based on its proposed adoption of new subdivisions (b) and (c).

Purpose:

The purpose of this amendment is to reorganize the regulation into three subdivisions.

Rationale:

This amendment is necessary because the Board is proposing to adopt two new subdivisions (b) and (c). As existing text is not subdivided, the Board needs to establish a new subdivision (a).

Subdivision (b)

The Board proposes to adopt a new subdivision (b), to provide "For the purposes of this section, a battery energy storage system, as defined in section 810, shall not be considered part of a photovoltaic solar energy system or required to install a photovoltaic solar energy system. Except as provided in subdivision (c), a licensee classified in this section shall not install, connect, modify, maintain, or repair a battery energy storage system."

Purpose:

The purpose of this proposed new subdivision is to specify expressly that photovoltaic solar energy systems do not include battery energy storage systems and to establish the activities in which a C-46 Solar Contractor may not engage.

Rationale:

This proposed new subdivision is necessary to expressly state that PV systems do not include BESS, and C-46 Solar Contractors may not work on BESS, except as provided in subdivision (c), to clear up claimed ambiguities identified in the Board's current regulation as it relates to BESS.

The C-46 Solar Contractor classification was established to enable solar contractors to install, modify, maintain, or repair thermal and PV systems, not modern BESS. The current scope of the C-46 Solar Contractor's work expressly includes PV systems, not BESS, and the classification regulation precludes them from doing out-of-classification work that is not required for the installation of a PV system. Since the two electrical systems have different uses, serve different purposes, and are treated differently in the building codes, this amendment will expressly establish what is already necessarily

implied in the current regulation: that PV systems and BESS are separate technologies and systems for purposes of the C-46 classification.

PV and BESS electrical systems are factually distinct systems. They are generally made up of different component parts. A BESS can be deployed to store energy from the power grid without the use of a PV system. A PV system deployed without a BESS can provide power during a sunny day without drawing from the grid and later draw from the grid at night or during cloudy days when the sun is not available.

PV and BESS electrical systems are also legally distinct systems. The California Electrical Code defines and treats PV and BESS as separate electrical systems (Articles 100, 690 and 706). It describes PV systems as capable of interacting with other electrical power production sources, standalone, or both and may or may not be connected to separate energy storage systems such as batteries. (Cal. Electrical Code, CCR, tit. 24, Part 3, § 690.1.) The two systems are also governed by different provisions of the Residential and Fire Codes (Cal. Fire Code, CCR, tit. 24, Part 9, §§ 1205 and 1207; Cal. Residential Code, CCR, tit. 24, Part 2.5, §§ R324 and R328).

While the two systems are distinct, there may be circumstances where a BESS paired with a PV system would be particularly useful, such as where a PV system alone without a utility connection would not be able to supply uninterrupted power to a structure without backup energy. Such an "off-grid" PV system without a BESS might only be able to supply power to a structure when the sun is out. However, an "off grid" pairing is only one application of a BESS and PV system, and the fact that BESS and PV systems may have more limited uses in some circumstances does not otherwise make a separate BESS part of a PV system for purposes of the current regulation. On the other hand, it might arguably supply the circumstances necessary under the current regulation for a C-46 contractor to install a BESS concurrently with a PV system installation, under the clause that permits them to "perform building or construction trades, crafts, or skills ... when required to install a ... photovoltaic solar energy system."

To clear up any claimed ambiguities in the current regulation, the proposed regulation expressly states that BESS "shall not be considered part of...or required to install a photovoltaic solar energy system," except in the circumstances described in subdivision (c). And when combined with the proposed subdivision (c), the proposed regulation (like the current regulation) would preclude a C-46 Solar Contractor from installing a standalone BESS that does not also include installation of a PV system. The amendment clears up identified ambiguities in the current regulation, while also preserving the factual and legal distinctions between BESS and PV systems, and scope of work distinctions that exist between the C-46 and the C-10 specialties.

The Board is charged with limiting the field and scope of the operations of a licensed contractor to those in which they are classified and qualified to engage, and with adopting rules for different classifications in a manner consistent with "established usage and procedures as found in the construction business." (BPC § 7059.) The construction business distinguishes between BESS and PV systems as separate systems that can

complement each other, but can also operate independently. The C-46 specialty is precluded in the current section 832.46 from engaging in a trade, craft, or skill that is not required to install a solar system, and the proposed regulation expressly preserves this aspect of the current law as it relates to BESS.

For these reasons, the Board proposes expressly limiting the C-46 Solar Contractor installation of BESS to specified applications in the following subdivision.

Subdivision (c)

The Board proposes to adopt a new subdivision (c), to provide "For purposes of Section 7059 of the [Business and Professions] Code and this division, a licensee classified in this section may install a battery energy storage system as 'incidental and supplemental' to the installation of a photovoltaic solar energy system if the battery energy storage system does not exceed a rating of 80 kilowatt-hours (kWh)."

Purpose:

The purpose of this proposed new subdivision is to establish the circumstances under which a C-46 Solar Contractor may permissibly install BESS.

Rationale:

In addition to the classification restrictions discussed above, contractors licensed in one specialty classification are generally prohibited from contracting in the field of another classification, unless they are (1) licensed in that classification or (2) are permitted to do so as "incidental and supplemental" work:

Nothing in this section shall prohibit a specialty contractor from taking and executing a contract involving the use of two or more crafts or trades, if the performance of the work in the crafts or trades, other than in which he or she is licensed, is incidental and supplemental to the performance of the work in the craft for which the specialty contractor is licensed.

(BPC § 7059, subd. (a); see also CCR, tit. 16, § 830, subd. (b).)

Out-of-classification work can be considered "incidental and supplemental" to in-classification work "if that work is essential to accomplish the work in which the contractor is classified." (CCR, tit. 16, § 831.)

Since BESS and PV systems are separate electrical systems, the proposed subdivision (c) is necessary to expressly enable C-46 contractors to install BESS in conjunction with the installation of a PV system. Despite being separate systems, PV systems and BESS can be complementary systems, and it is increasingly common that they are paired together. Also, C-46 contractors presently install BESS in conjunction with PV system installations. The proposed regulation will help expressly align the classification

regulation with the practice currently found in the construction industry. Moreover, the pairing of PV systems with BESS will help meet California's clean energy and carbon reduction goals.

In light of these circumstances, C-46 contractors should be permitted to install BESS in conjunction with the installation of PV systems, up to a certain threshold, and the way the CSLC and its enabling regulations permit a specialty contractor to contract in the field of another contractor is when the out-of-classification work is "incidental and supplemental"—i.e., essential to the installation of—the in-classification work. For the reasons described herein, the Board views BESS installation work as incidental and supplemental to PV installation work, up to 80 kWh.

An 80-kWh threshold is reasonable for several reasons. First, there is no evidence of consumer harm caused by either contractor classification installing BESS up to and including this threshold. Where the largest risk of BESS harm is "thermal runaway," the June 2022 Staff Report found the risk of this occurring arises from internal circuitry, physical mishandling, and/or defects, and not the contractor's installation. Furthermore, within the 80-kWh threshold, the risk of harm does not increase when installing a single 20-kWh BESS, or assembling multiple individual BESS together to reach a higher kWh, and the electrical theory required to do so is the same. (June 2022 Staff Report.)

There are also sufficient third-party protections in place to limit the possible risk of harm caused by licensed contractors, including the Underwriters Laboratories (UL) safety certification standards adopted by the industry that all BESS must meet, as well as the Electrical, Residential, and Fire Codes with which all contractors must comply, regardless of license classification. The June 2022 Staff Report further concluded when a contractor has met the minimum standards for C-10 and C-46 licensure, they have the skill and ability needed to make the electrical connections required for smaller BESS installations within an 80-kWh threshold when paired with a solar PV system.

Second, electrical system connections required at thresholds above 80 kWh are more appropriate for a C-10 Electrical Contractor. Even though the risk of fire or complexity of installation does not change when assembling multiple BESS together to increase kWh ratings, the electrical skill and knowledge required for the installation changes when installing larger BESS to buildings with heavier power loads. This is because the higher the kWh threshold of a BESS, the more likely the solar-paired BESS installation exceeds what is typically installed for residential or light commercial applications and requires connections, upgrades, or changes to main electrical service panels to accommodate the larger BESS. This involves skills, trades or crafts exceeding the scope of the C-46 Solar Contractor classification. The June 2022 Staff Report found that larger buildings with heavier power loads have more complex electrical systems requiring knowledge of electrical theory and devices not involved with the interconnection of PV systems that C-10 Electrical Contractors are tested on in their license examination. The work required to connect BESS to larger buildings therefore involves knowledge and skills more appropriate for the C-10 Electrical Contractor than the C-46 Solar Contractor.

Third, BPC section 7059 provides that the Board may adopt classification regulations “in a manner consistent with established usage and procedure as found in the construction business...,” and the California Court of Appeal explained that “[s]o long as classification occurs in a manner consistent with established usage in the industry, the Board has the power to amend classifications as it sees fit.” (*Davies v. CSLB* (1978) 79 Cal.App.3d 940, 949.)

The 80-kWh threshold is consistent with projects that are prevalent in the C-46 construction field, which is the population most directly affected by this proposal. In fact, C-46 Solar Contractors holding no other license classification typically perform installations far below an 80-kWh threshold, at sizes most commonly found in the residential marketplace.

The average capacity of all solar-paired BESS projects installed by C-46 Solar Contractors holding no other license classification between 2015 and 2020 was 17.15 kWh, according to the CSLB’s review of the raw SGIP data, and it was 19.2 kWh in 2020, according to CSLB’s review of the raw Interconnection data. (See June 2022 Staff Report, p. 13.) For this same population, based on CSLB’s evaluation of 556 BESS, the average capacity for residential projects was 15.79 kWh, and for non-residential projects it was 33.34 kWh. (June 2022 Staff Report, p. 13.) As such, the recommended 80-kWh threshold will continue to permit C-46 Solar Contractors to install BESS at a level prevalent among C-46 Solar Contractors in the construction business.

In addition, C-46 Solar Contractors typically install smaller projects with sizes commonly found in residences, not larger commercial projects. As reported in the June 2022 Staff Report, the average rated power of residential BESS installations in California was between 6 and 7 kw, and the average rated power for nonresidential installations was between 91 and 130 kw. (June 2022 Staff Report, pp. 12-13; UC Berkeley Report, p. 32, Table 5.)

Based on CSLB’s review of 556 battery energy storage systems, the capacity of BESS in kWh can be derived by multiplying the size of the system in kw by 2.7 (i.e., 6.03 kw x 2.7 = 16.3 kWh). (June 2022 Staff Report, p. 13.) Using this same conversion method, the average capacity of residential BESS installations in California was between 16.3 and 18.36 kWh, and the average capacity for nonresidential installations was between 246.4 and 351 kWh.

As noted above, the average capacity of all solar-paired BESS projects installed by C-46 Solar Contractors holding no other license classification ranged from 17.15 kWh, according to the raw SGIP data, to 19.2 kWh, according to the raw Interconnection data. (See June 2022 Staff Report, p. 13.)

Since the average capacity range of all C-46 BESS installations (17.15-19.2 kWh) also fits neatly within the average range for all California residential installations (16.3-18.36 kWh), and it falls far below the average range of all California nonresidential installations

(246.37-351 kWh), it is clear that C-46 contractors install smaller projects with sizes commonly found in residences, and not larger commercial projects.

Fourth, the 80-kWh threshold is supported by Title 24. Since Title 24 codes are adopted through a rigorous stakeholder participation process with the purpose of ensuring life safety in property and quality in construction, the Board relies on Title 24 standards in proposing a kWh threshold for this rulemaking. Title 24 provides that 80 kWh is the maximum kWh of a BESS allowed in one location in the Residential Code, and in specified residential occupancies in the Fire Code, within attached or detached garages and detached accessory structures, on exterior walls, or outdoors on the ground (Cal. Residential Code, CCR, tit. 24, Part 2.5, § R328.5,¹ Cal. Fire Code, CCR, tit. 24, Part 9, § 1207.11.4). The June 2022 Staff Report showed that installations above this standard are subject to more rigorous safety standards because they present greater risks. This fact is also generally consistent with the finding that higher kWh installations tie into more complex electrical systems. Since C-46 Solar Contractors holding no other license classification typically install BESS within an 80-kWh threshold, and in sizes more commonly found in residential applications regulated by the Title 24 codes, 80 kWh is a reasonable standard to provide consistency with other laws governing construction in California.

For these reasons, the Board proposes the C-46 Solar Contractor be expressly authorized to install BESS up to 80 kWh when installed at the same time as incidental and supplemental to a PV system. The data shows residential and light commercial installations primarily fall within this threshold. This proposal will not impair businesses performing this work, and the Board regards these installations as essential to California's clean energy and decarbonization goals. The proposal further ensures that when BESS is deployed at structures with heavier power loads, which is likely to occur at thresholds higher than 80 kWh, the C-10 contractor is the classification with the appropriate knowledge and skill because the activities required to make those electrical connections extend beyond the trade skills needed for the installation of a PV system. This preserves the distinctions between the trades and their workforces while promoting public protection by limiting that work to those who have met the minimum qualifications.

Underlying Data

1. Senate Bill 100 (De Leon, Chapter 312, Statutes of 2018)
2. Building Energy Efficiency Standards (Energy Code), CCR, Title 24, Part 6 (provisions requiring PV in residential 2020 and PV and BESS in commercial in 2022)
3. February 16, 2016, email from CSLB to Eddie Bernacchi of the National Electrical Contractors Association and CSLB response
4. July 18, 2017, Emails and Letter with Center for Sustainable Energy

¹ Cal. Residential Code, CCR, Title 24, Part 2.5, section R328.5 and Cal. Fire Code, CCR, Title 24, Part 9, section 1207.11.4 are referenced in the 2022 June Staff Report as sections R327.5 and 1206.11.4, respectively, as they were recently renumbered during the BSC's 2021 Triennial Code Cycle.

5. April 13, 2018, Board Meeting Packet, p. 155
6. February 23, 2018, Licensing Committee direction
7. March 21, 2019, CSLB Battery Energy Storage Systems Report
8. March 21, 2019, Board direction
9. August 6, 2019, Legislative Committee direction
10. November 7, 2019, Legislative Committee direction
11. December 19, 2019, Board direction
12. June 30, 2021, UC Berkeley Battery Energy Storage Systems License Classification Report
13. November 29, 2021, Board direction
14. March 30, 2022, Board direction
15. June 3, 2022, Battery Energy Storage Systems CSLB Staff Report in Consultation with Expert Consultants
16. June 16, 2022, CSLB Board Meeting Minutes, pp. 19-26
17. California Building Standards Code (CCR, Title 24), in the California Residential Code, CCR, Title 24, Part 2.5, section R202, the California Electrical Code CCR, Title 24, Part 3, Article 706, and the California Fire Code, CCR, Title 24, Part 9, section 202
18. March 30, 2022, Board Meeting Packet (staff explanation, Board vote)
19. Photovoltaic Cell (description, University of Calgary)
20. California Electrical Code, CCR, Title 24, Part 3, Article 690
21. California Residential Code, CCR, Title 24, Part 2.5, section R328.5
22. California Fire Code, CCR, Title 24, Part 9, section 1207.11.4
23. California Electrical Code, CCR, Title 24, Part 3, section 100

Business Impact:

The Board has made the initial determination the proposed regulations will not have a significant statewide adverse economic impact directly affecting businesses (including the inability of California businesses to compete with businesses in other states).

This initial determination is based on the following facts:

- The Board has determined the only types of businesses that may be affected are licensed contractors who hold a C-46 Solar Contractor classification and no other license classification that authorizes the contractor to install BESS (i.e., a C-46 that holds no C-10, "A", or "B" classification). Businesses holding a C-10 classification will not be adversely affected as C-10 contractors may install BESS without limitation and this regulation would continue to allow such installations.
- As of August 2022, there were 481 C-46 Solar Contractors who do not hold any other license classification authorizing them to install BESS (i.e., a C-46 and no C-10, "B", or "A" classification). Ostensible impact to the 481 licensees would be twofold to those who are: (1) currently in the business of installing PV systems paired with a BESS; and (2) installing PV systems paired with BESS at a kWh rating higher than 80 kWh. According to the 2020 Interconnection data, this

population installed 601 BESS out of 13,073 total projects (4.6% of all projects), with an average BESS size of between 17.82 kWh, based on CSLB's review of 556 BESS, or 19.2 kWh, based on CSLB's review of the raw Interconnection data. (See June 2022 Staff Report, p. 13.) Even using a different data set, the SGIP data, between 2015 and 2020, this population installed 1,223 BESS out of 19,194 total projects (6.4% of all projects) with an average BESS size of between 14.04 kWh, based on CSLB's review of 556 BESS, and 17.15 kWh, based on CSLB's review of the raw SGIP data. In sum, the 481 C-46 contractors holding no other license classification authorizing them to install BESS only install between 4.6% and 6.4% of all BESS projects, a small share of the overall number of projects. And based on the average size of installations by this population, most of the projects they perform are at kWh capacities much lower than 80 kWh, if they install BESS at all (some solar contractors may only install PV systems and not BESS). As a result, the number of licenses potentially affected is insufficient to create a statewide adverse economic impact. Indeed, the UC Berkeley Report concluded that completely "precluding or restricting C-46 (no C-10, A, or B) contractors will have a negligible effect on the current pool of contractors, because only a tiny fraction of current BESS installations has been carried out by contractors holding only a C-46 license without an A, B, or C-10 license." (UC Berkeley Report, p. 37.)

Economic Impact Assessment:

The Board has determined that this regulatory proposal will have the following effects:

- It will not significantly create or eliminate jobs within the State of California. The UC Berkeley Report estimated as of June 2021, there were 6,317 non-electrical solar installers and 4,204 electrician solar installers (i.e., workers, not licensed contractor employers) in California. (UC Berkeley Report, p. 81.) The UC Berkeley Report conducted an economic analysis of the workforce impact of precluding the C-46 from installing BESS entirely to make it the exclusive domain of the C-10. UC Berkeley found that if C-46 contractors holding no other license classification authorizing them to install BESS were precluded from installing BESS entirely, it might equate to the loss of between 11 and 18 full-time jobs in the residential market statewide (UC Berkeley Report, p. 29). While no comparable analysis was conducted for the commercial market, C-46 contractors mostly install BESS at sizes commonly found in the residential market, and UC Berkeley found that their participation in the commercial market was "negligible" and reported at "0%," according to SGIP data (UC Berkeley Report, pp. 26, 28, figure 11). This proposal does not preclude C-46 contractors from installing BESS entirely. Instead, the proposed regulation will permit C-46 contractors to continue installing BESS over and above the project sizes that they already typically install. Indeed, UC Berkeley concluded that a restriction of 5 kw and 20 kWh "would basically maintain the status quo." (UC Berkeley Report, pp. 5, 14, 31.) The Board is proposing an 80-kWh restriction, far greater than the restriction that UC Berkeley called "the status quo." The Board therefore concludes that any job impact will be significantly less

than the minimal impact established by UC Berkeley if the Board were to completely preclude C-46 contractors from installing BESS. Any C-46 Solar Contractor without another license classification seeking to install BESS above 80 kWh may opt to apply for a C-10 Electrical Contractor license for \$230.

- It will not create new businesses or eliminate existing businesses within the State of California. This proposal impacts how a single technology within an existing marketplace – the BESS-paired PV system installations – will be characterized for the purpose of defining the scope of existing specialty contractor license classifications. No existing business that already installs BESS paired with PV systems will be precluded entirely from installing BESS paired with PV systems as a result of this proposal.
- It will not adversely affect the expansion of businesses currently doing business within the State of California. BESS paired with PV systems is an emerging and expanding business already conducted by C-10 and C-46 businesses.
- This regulatory proposal will positively affect the health and welfare of California residents. In California, in general, a contractor's license is required to affix an electrical device to a structure if the contract exceeds \$500 for labor and materials. The California Electrical Code requires all connections regulated by the Code to be made by qualified persons (Cal. Electrical Code, tit. 24, Part 3, art. 100). However, BESS has been undefined for the purposes of CSLB contractor license classifications. When it is unclear which license classification(s) can install which technology with an accompanying risk of electrical shock or fire, consumers are at risk. This proposal will set the minimum standards for licensure for the C-46 and C-10 specialty trades that will work with this technology. This establishes who is qualified to install BESS and in which capacities for the purpose of specialty contractor licensing, which in turn will provide public protection in the marketplace for PV systems paired with BESS.
- This regulatory proposal benefits worker safety because it ensures that only appropriately skilled workers install BESS, and safety standards are being met for licensed contractors who work with BESS and employ workers to do so. As discussed, electrical system connections required at thresholds above 80kWh are more appropriate for C-10 contractors, and the proposed regulation ensures that only qualified contractors install BESS. Additionally, pursuant to the California Residential and Fire Codes, 80 kWh is the maximum allowable capacity for BESS that can be installed for a residential occupancy within common residential locations. (Cal. Residential Code, CCR, tit. 24, Part 2.5, Section R328.5, Cal. Fire Code, CCR, tit. 24, Part 9, Section 1207.11.4). Above 80 kWh, more rigorous safety standards are applied to the installation of BESS. If a C-10 license is required to equip a PV system with a BESS above 80 kWh, an installing worker may also be required to secure electrical certification that meets the requirements of California's Division of Apprenticeship Labor Standards Enforcement (see

Chapter 4.5 (commencing with section 108) of Division 1 of the Labor Code) for a skilled workforce trained in electrical safety.

- This proposal will not impact the state's environment. CSLB has determined this proposal will not affect demand for PV systems and BESS and will not decrease the deployment of BESS paired with PV systems in California because:
 - The UC Berkeley Report found the number of PV systems with BESS (PV-paired BESS) is increasing in California. (UC Berkeley Report, p. 20.) While the number of installations is increasing, the average size of storage systems in California is declining due to the “rapid growth of residential installations” that tend to be smaller in kWh size. (*Ibid.*) The average size of all BESS installations between 2015-2020 in the UC Berkeley data was 10.9 or 8.0 kW, depending on the data set. (UC Berkeley Report, p. 25.) Based on CSLB's review of 556 BESS, the capacity of BESS in kWh can be derived by multiplying the size of the system in kw by 2.7 (i.e., 10.9 kw x 2.7 = 29.43 kWh). (June 2022 Staff Report, p. 13.) Using this same conversion method, the average capacity of all BESS installations in California was between 29.43 and 21.6 kWh, which is well below the 80-kWh proposed by this regulation. And as discussed above, C-46 contractors installed projects with an average BESS size of between 14.04 kWh and 19.2 kWh, based on the data set used, which is far below even the average size for all BESS installations in California. By every measure then, even though the number of PV-paired BESS installations may continue to increase, the size of the projects installed by C-46 contractors are well less than the 80 kWh proposed by this rulemaking. Consequently, C-46 contractors that presently perform BESS installations will continue to be able to perform BESS installations even after the proposed rule is adopted.
 - CSLB records show that as of December 1, 2022, there were 148,619 licensed contractors authorized to take a contract to self-perform or subcontract to the appropriate license classification, in the appropriate circumstances, a PV-paired BESS system in accordance with their license classification. This included 15,086 “A” General Engineering contractors, if the contract is in connection with a fixed work requiring special engineering knowledge or skill (BPC section 7056); 105,187 “B” General Building contractors, if the contract requires two or more unrelated trades in addition to framing and carpentry (BPC section 7057); as well as 27,043 C-10 Electrical Contractors; and 1,303 C-46 Solar Contractors. This amounts to nearly 63% of the overall CSLB license population who were authorized to contract for the installation of PV-paired BESS in specified circumstances. All 148,619 have met the contractor license experience requirements of section 825 of Article 3 of Division 8, Title 16 of the CCR or qualified for licensure using one of the license waiver or additional classification statutes in BPC sections

7065.1, 7065.2, 7065.3, or 7065.4. These totals include the previously identified 481 C-46 Solar Contractors holding no other license classification authorizing them to install PV-paired BESS.

- Qualified solar workers and certified electricians are available to install PV-paired BESS over the near and long term. The UC Berkeley Report analyzed the economic impact of alternative licensing scenarios on this topic (UC Berkeley Report, pp. 76-82). UC Berkeley analyzed the availability of certified electricians and PV installers (the workers who may perform PV-paired BESS installations as employees of licensed contractors) and found as of March 2021 in California, there were 36,550 certified electricians, 11,423 electrical trainees, 72,870 electricians, 4,740 electrician helpers, 4,970 solar installers, and 74,255 solar jobs (*Id.*, p. 81). The UC Berkeley Report concluded the workforce, whether C-10 or C-46 employers, is “plentiful,” can expand with demand, and that an outright preclusion of C-46 employers from installing BESS would have no adverse economic impact: “There is no evidence to suggest that workforce availability will limit the growth of BESS installations if CSLB were to restrict or exclude sole license C-46 contractors since C-10 vastly outnumber C-46 contractors both in general and specifically in their participation in BESS projects.” (*Id.*, pp. 81, 90, 96.)
- The UC Berkeley Report (pp. 82-94) also studied whether a change in the scope of the C-46 license would have adverse impacts on the cost of BESS and whether it would impede the growth of the industry, using national and state data sets. On this issue, UC Berkeley studied cost differentials between the two data sets, cost differentials between contractors with different licenses in California, the effect on cost differentials if a BESS restriction on C-46 contractors changed the solar workforce, the impact of cost differentials on consumer demand, the costs of training and turnover, and the transition costs for alternative regulatory thresholds. (*Ibid.*) On these issues, the UC Berkeley Report concluded the following:
 - No significant savings in project costs with installations performed by C-46 Solar Contractors holding no other license class, due to labor costs being a small percentage of the total cost for BESS installation, whether performed by certified electricians or solar installers. In fact, even at the extreme—if all installations were performed by the more expensive contractor and worker, which is an unrealistic scenario—it would amount to an overall project cost increase of 1-2%, which “is unlikely to slow or reduce consumer demand.” (UC Berkeley Report, pp. 82, 85, 86.) “[A]n increase in wages, if it in fact occurs, is unlikely to change consumer behavior or dampen demand for BESS.” (*Id.* p. 90.)

- The least expensive BESS installations are performed by contractors that have both C-10 and C-46 license classifications.
- Transition costs of precluding C-46 Solar Contractors from installing BESS outright (which these regulations do not propose) would be minimal because C-46 Solar Contractors holding no other license classification and their workforce install such a small number and percentage of BESS in California. (UC Berkeley Report, pp. 92-94.)
- UC Berkeley found there will be no adverse economic impacts in precluding the C-46 license from installing BESS entirely, finding this to be true for both the residential and commercial market and for urban and rural counties. (UC Berkeley Report, pp. 11-12, 96.)
- The UC Berkeley Report raised a number of different economic and consumer demand related issues on the topic of outright preclusion of C-46 Solar Contractors from installing BESS (which again, these regulations would not do).
 - In particular, UC Berkeley studied the labor costs of transitioning to an all-solar installer or all-certified electrician work force (laborers versus state-certified electricians) and found a “very small cost differential that is unlikely to slow or reduce consumer demand” in California. (UC Berkeley Report, p. 82.) The UC Berkeley Report buttresses this finding with a conclusion based on national data that storage customers are not particularly cost-sensitive. (*Id.*, p. 89.)
 - UC Berkeley also studied the impact on C-46 and C-10 workforce should there be an outright preclusion of C-46 from installing BESS. In evaluating solar incentive data for commercial, government/education, multifamily, nonprofit, and residential sectors, UC Berkeley found if there is an increase in wages, it is unlikely to change consumer behavior, dampen demand for BESS, and will “certainly not” impair the impact of subsidies and incentives available to consumers installing this technology. (UC Berkeley Report, p. 90.)

Need for Environmental Review

The California Environmental Quality Act (CEQA) directs that long-term protection of the environment be a guiding criterion in public decisions. (Public Resources Code, § 21001, subd. (d).) CEQA applies to “projects,” defined in Public Resources Code section 21065 as “an activity which may cause either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment, and which is (a) An

activity directly undertaken by any public agency. (b) An activity undertaken by a person which is supported, in whole or in part, through contracts, grants, subsidies, loans, or other forms of assistance from one or more public agencies. [or] (c) An activity that involves the issuance to a person of a lease, permit, license, certificate, or other entitlement for use by one or more public agencies.” An activity that is not a “project” is not subject to CEQA. (CCR, tit. 14, § 15060, subd. (c)(3).)

The Proposed Regulations are Not a “Project” subject to CEQA

CSLB preliminarily believes that the proposed regulations are not a “project” within the meaning of Public Resources Code section 21065. While the proposal addresses the work that may be performed by contractors holding C-10 or C-46 licenses, it does not pertain to the issuance of licenses or other entitlements for use to persons, as understood and applied in the context of CEQA. In addition, there is no evidence that the proposed regulations, if adopted, “may cause either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment.”

One stakeholder has posited the proposed regulations may have an indirect environmental impact based on the following chain of logic related to the social and economic effects of the proposal: (1) the proposed restriction on C-46 licenses will remove a significant number of contractors and qualified workers from the market of businesses that install BESS; (2) hiring contractors with C-10 licenses is a more expensive option than hiring contractors with C-46 licenses; (3) there’s a shortage of qualified C-10 license holders and their workers relative to the anticipated demand for BESS; (4) it is more expensive for aspiring contractors to qualify for a C-10 license or certification as an electrician by the Division of Labor Standards Enforcement (“DLSE”); (5) the combination of higher costs and shortage of qualified contractors and workers will dissuade consumers from installing BESS; (6) as a consequence, consumers will remain dependent on fossil fuel energy sources for some or all of their energy needs; and (7) this in turn will result in more harmful pollution to the environment.

This argument is based on flawed premises, is wholly speculative, and is predicated entirely on social and economic factors that were exhaustively studied and analyzed in the UC Berkeley Report.

At the outset is an assertion about the scope of the proposed regulation—that it will prohibit C-46 contractors from repairing BESS or retrofitting existing PV systems with BESS. This assertion misapprehends the current state of the law. As discussed above, current law already prohibits C-46 contractors from performing all manner of BESS work, including BESS installations, except as necessary to install (not retrofit) a PV system. The proposed regulation does not change, but preserves, the existing classification restriction by permitting C-46 contractors to install BESS with the installation of a PV system.

The assertion that the proposal will remove a significant number of contractors and qualified workers from the market of businesses that install BESS is contrary to the fact

that C-46 contractors holding no other license classification authorized to install BESS complete only a "tiny fraction" of the overall number of BESS projects and, consequently, "precluding or restricting C-46 (no C-10, A, or B) contractors will have a negligible effect on the current pool of contractors...." (UC Berkeley Report, p. 37.)

It is also contrary to the facts that of the tiny fraction of projects, most BESS installations performed by C-46 license holders are well below the proposed 80 kWh threshold, and that C-46 contractors install BESS within the sizes most commonly found in the residential market, which range between 16.3 kWh and 18.36 kWh, also far lower than the proposed 80 kWh threshold. Thus, the UC Berkeley Report concluded that "neither restricting C-46 contractors from installing BESS nor precluding them altogether would significantly impact the current BESS industry...." (UC Berkeley Report, p. 26.) Indeed, it called a 5 kw / 20 kWh threshold—a threshold much lower than the proposed regulatory threshold here—"the status quo" in terms of the size of BESS that C-46 contractors install. (UC Berkeley Report, pp. 5, 14, 31.)

In addition, the UC Berkeley Report concluded that even if C-46 contractors were completely excluded from the BESS residential marketplace, it might equate to a loss of between 11 and 18 full-time jobs statewide. (UC Berkeley Report, p. 29.) Thus, even if contractors holding only a C-46 license were precluded entirely from installing BESS, which the UC Berkeley Report recommended but this proposal would not do, the number of contractors and workers removed from the BESS market would be insignificant relative to the total number of contractors otherwise eligible to perform this work. Finally, the assertion that the proposed regulation would impact the workforce of dually licensed C-46 and C-10 contractors is also incorrect. The employees of C-10 contractors who engage in the connection of electrical devices need to be certified electricians. This is a Labor Code requirement and this rulemaking does not change it.

The claim that hiring contractors with a C-10 license is more expensive than hiring contractors with C-46 licenses is also speculative and contrary to data studied and analyzed in the UC Berkeley Report. That report found that labor was only a small percentage of the cost of BESS installation, that there were no significant cost differences for BESS installation by C-10 contractors compared to C-46 contractors, and that cost in and of itself was not a primary motivator for a consumer's decision to install BESS. In fact, the report exhaustively evaluated the stakeholder's concern that restricting C-46 contractors' ability to install BESS would add costs and found, in sum, "that these concerns are not borne out by the evidence." (UC Berkeley Report, p. 89.)

The claimed shortage of C-10 contractors and their certified electrical workers relative to the anticipated demand for BESS is again speculative and contrary to the facts, as well as irrelevant to the question of whether the absence of an 80-kWh threshold will enable the much smaller number of C-46 contractors to meet that demand. "There is no evidence to suggest that workforce availability will limit the growth of BESS installations were CSLB to restrict or exclude sole license C-46 contractors since C-10 vastly outnumber C-46 contractors both in general and specifically in their participation in BESS projects." (UC Berkeley Report, p. 81.) This faulty premise also necessarily assumes that

C-46 contractors will be excluded from the BESS market because future demand will be at sizes above the 80-kWh threshold, which again, is contrary to the facts that expansion is happening in the residential marketplace at thresholds below 80 kWh. (UC Berkeley Report, p. 20.)

The assertion that it is more expensive for C-46 contractors to qualify for a C-10 license is undoubtedly true—for C-46 contractors without a C-10 license, it would cost a one-time fee of \$230 to add a C-10 license. But this is not a logical basis for concluding that C-46 license holders will be driven out of the BESS marketplace by the 80-kWh limitation. Instead, what the available evidence shows is that there will be plenty of demand for BESS below the 80 kWh threshold and the threshold in and of itself will have no bearing on whether overall demands can be met.

As discussed, the contentions about higher costs and a shortage of qualified contractors were exhaustively reviewed and found to be without merit. They are wholly speculative and contrary to the data studied and analyzed in the UC Berkeley Report.

The resulting conclusions that consumers will remain dependent on fossil fuels leading to more pollution of the environment are dependent upon the other elements in the chain of logic that are grounded in faulty premises and speculation rather than discernible evidence, and contrary to actual evidence that has been studied and analyzed in the UC Berkeley Report. Consequently, the stakeholder analysis summarized above does not provide a plausible basis for concluding that these proposals “may cause either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment” (Pub. Resources Code § 20165.)

The Proposed Regulations Fall Within The “Common Sense” Exemption to CEQA

Even if the proposal would be considered a “project” for CEQA purposes, CSLB preliminarily believes that the proposal is exempt from CEQA requirements under the “common sense” exemption in the CEQA regulatory guidelines at CCR, Title 14, section 15061, subd. (b)(3). That provision exempts projects from CEQA requirements “[w]here it can be seen with certainty that there is no possibility that the activity in question may have a significant effect on the environment[.]”

CEQA defines “environment” as “the physical conditions which exist within the area which will be affected by a proposed project, including land, air, water, minerals, flora, fauna, noise, objects of historic or aesthetic significance.” (Pub. Resources Code § 21060.5.) “Significant effect on the environment” means a substantial, or potentially substantial, adverse change in the environment.” (Pub. Resources Code § 21068.) Economic and social effects are not by themselves significant effects on the environment absent a direct causal connection between those effects and the physical environment. (CCR, tit. 14, §§ 15131, 15382; *Chico Advocates for a Responsible Economy v. City of Chico* (2019) 40 Cal.App.5th 839 at 847-8.)

Application of the common sense exemption is determined from the available facts, with the agency bearing the burden of showing that it applies. (*Muzzy Ranch Co. v. Solano County Airport Land Use Commission* (2007) 41 Cal.4th 372, 386.) CSLB proposes to make safety-based modifications to the C-10 and C-46 license classifications. License classification standards do not cause direct physical changes in the environment, nor is there evidence to suggest that they may indirectly cause a significant effect on the environment.

As noted in the preceding section, one stakeholder has posited a chain of factors which, if all prove to be true, may alter the behavior of potential users of BESS, not by changing their behavior in ways that are harmful to the environment, but by not changing their behavior, or not changing it quickly enough, to align with the state's clean energy goals.

However, the showing required to overcome the exemption cannot be founded upon "any possibility of an environmental impact, however remote or outlandish[.]" (*Davidon Homes v. City of San Jose* (1997) 54 Cal.App.4th 106, 118.) And as discussed, the factual predicates for this outcome are speculative, not grounded in fact, and instead are refuted by the evidence that was exhaustively studied and made part of the record of this rulemaking.

Based on the studies referenced above, CSLB believes that this proposal is in alignment with fact, the state's solar policy, and with where the market is headed, including by ensuring greater skill and safety for BESS installations. Accordingly, CSLB believes it can determine with certainty there is no possibility the proposed regulations may have a significant effect on the environment.

Specific Technologies or Equipment:

This regulation does not mandate the use of specific technologies or equipment.

Consideration of Alternatives:

CSLB has made an initial determination that no reasonable alternative to the regulatory proposal would be more effective in carrying out the purpose for which the action is proposed.

The Board initially voted to preclude C-46 Solar Contractors from installing BESS entirely, consistent with the analysis and conclusions in the UC Berkeley Report. However, out of concern over possible, albeit minimal, impacts among C-46 contractors, CSLB looked into alternatives and eventually proposed adoption of the 80-kWh threshold. CSLB believes this threshold is consistent with the practice among C-46 contractors and which experience shows does not pose an undue safety risk.

Electrician certification program - What is an electrician trainee?

español

What is an electrician trainee?

Legislation passed in 1999 requiring all electricians who work for a C-10 [electrical contractor](#) to be certified by the state of California. Regulations from that legislation were put in place in 2002, setting deadlines for all categories of electricians. Many of those deadlines have already passed.

To continue to work as an electrician after the deadline has passed, a person must be one of the following: certified by having taken and passed the exam or an apprentice in a state approved program or an electrician trainee.

If a person wants to perform electrical work for a C-10 contractor and does not yet qualify to take the certification exam because of lack of work experience or related instruction, can do so legally by registering as an [electrician trainee](#).

For more details:

California Labor Code definition of an electrician trainee

Deadlines for electrician certification

Electrician [trainee registration form](#)

An electrician trainee must be enrolled in a state [approved school](#) and under the supervision of a certified electrician that supervises only one electrician trainee.

How do I become an electrician trainee?

1. Submit an electrician [trainee registration application](#) with a check for \$25 payable to the order of:

- DIR – Electrician Certification Fund

2. Submit proof of enrollment in an [approved school](#).

- Mail to:
Department of Industrial Relations (DIR)
DLSE-Electrician Certification Unit
P.O. Box 511286
Los Angeles, CA 90051-7841

How can we
help you
today?



April 2020

ENERGY STORAGE + MICROGRID

TRAINING + CERTIFICATION

HOME (/)

ABOUT (/ABOUT)

CERTIFICATION CHECK

CONTACT (/CONTACT)

ENERGY STORAGE + MICROGRID TRAINING & CERTIFICATION

Industry Partnership

Energy storage industry stakeholders have identified the need for a nationwide contractor network that has certified expertise in the safe and effective installation, commissioning, maintenance, retrofitting, and

decommissioning of energy storage and microgrid equipment and systems.



The ESAMTAC initiative, led by Penn State University, is a nonprofit, brand neutral, national training and certification program based on standards and codes developed and/or approved by the National Fire Protection Association (NFPA), National Electrical Installation Standards (NEIS), National Electrical Code (NEC), American National Standards Institute (ANSI), and the Electric Power Research Institute (EPRI). ESAMTAC is a nonprofit organization supported by industry contributions, and by the National Science Foundation.

CONTACT US (/CONTACT)

MISSION

ESAMTAC is an education/training program and credential that prepares electrical contractors and workers for the safe and effective assembly, testing, commissioning, maintenance, repair, retrofitting, and decommissioning of energy storage and microgrid (ESM) systems.

COURSE

The ESAMTAC course develops knowledge and skills with an emphasis on energy storage and microgrid components. The course includes instruction, testing and credentialing based on skills attainment.

Course work includes a robust overview of ESM systems and hands-on activities to reinforce classroom instruction.



ABOUT ESAMTAC TRAINING AND CERTIFICATION

PRIMARY MODULES

- 1: Business drivers of ESM systems
- 2: Microgrid systems & components (generation)
- 3: Energy storage systems and components
- 4: Safety of ESM
- 5: DC Power systems (DC theory)
- 6: ESM assembly & method of procedure
- 7: ESM system Arc flash & shock protection
- 8: Battery enclosure & rack components & requirements
- 9: Installation of batteries into racks and enclosures
- 10: Connections between batteries
- 11: DC power conductors and connections

HANDS-ON LABS

- 1.1 Microgrid Applications
- 1.2 Energy Storage Application
- 2.1 Inverter Properties
- 2.2 Micro-turbine Interconnection
- 3.1 En. Storage Chemistry and Application
- 4.1 PPE selection
- 4.2 Emergency Action Plan for Lead Acid Battery Installation
- 5.1 Wet cell battery maintenance
- 6.1 Method of Procedure
- 7.1 Hazard & Arc Fault Risk Assessment
- 8.1 Battery Systems Case Study
- 9.1 Moving Batteries into Racks
- 10.1 Making Connection Cables
- 10.2 Connecting Batteries in a Row

- 12: Grounding & Bonding of ESM systems
- 13: DC control conductors and connections
- 14: Situational assessment of installed ESM systems

- 11.1 Build Fine Twisted Strand Cable
- 11.2 DC Cable Connections
- 11.3 ESM Project Planning Analysis



Industry Partnership



Energy Storage and Microgrid Training and Certification

Let's
Connect!



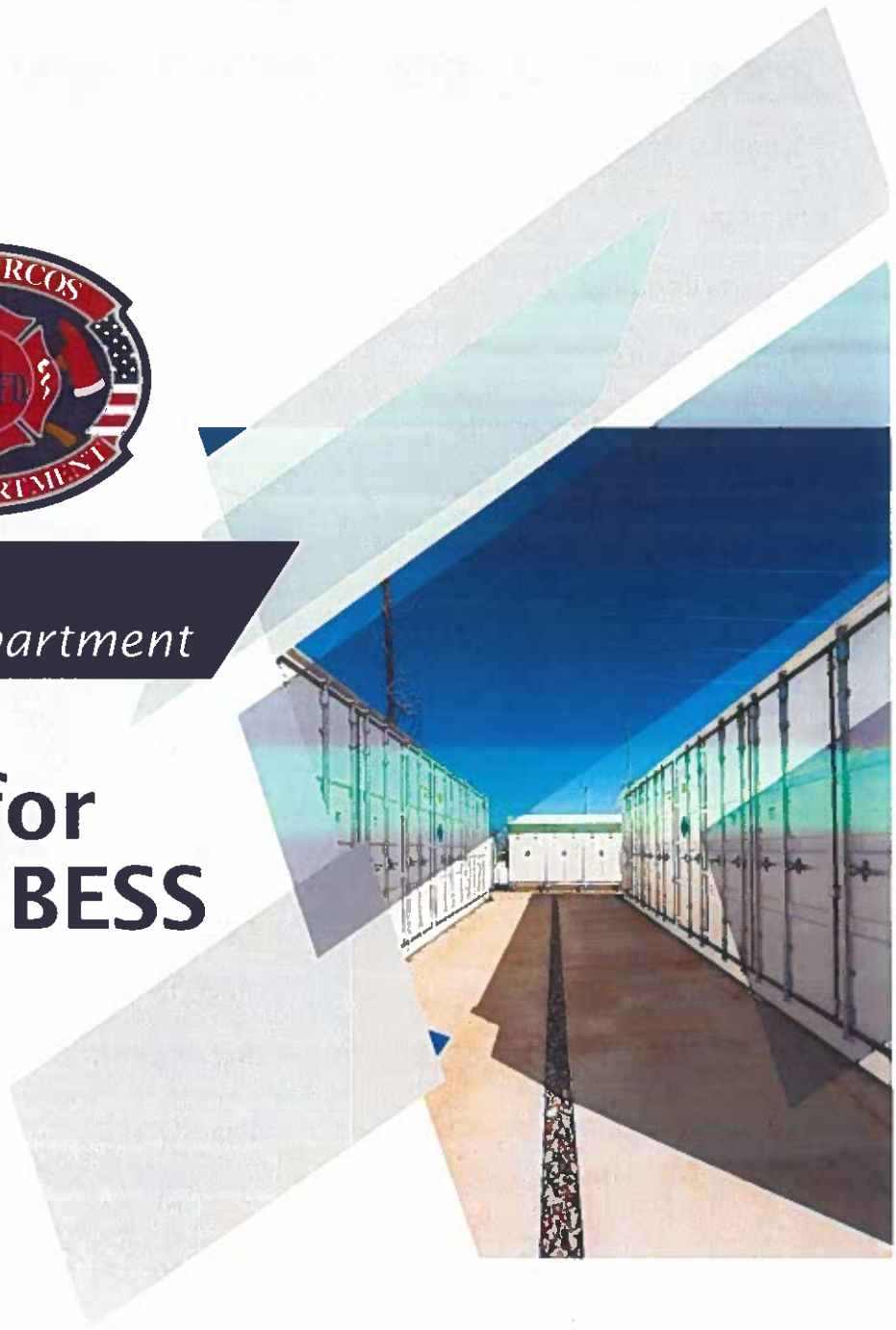
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Download Brochure



*City of San Marcos/
San Marcos Fire Department*

Protection Guidelines for Lithium-Ion BESS Facilities



This protection guideline applies to all facilities utilizing lithium-ion batteries in an energy storage system (ESS) where the nominal capacity exceeds 600 kWh. References to NFPA 855 are to the 2026 Edition.

V2/2026

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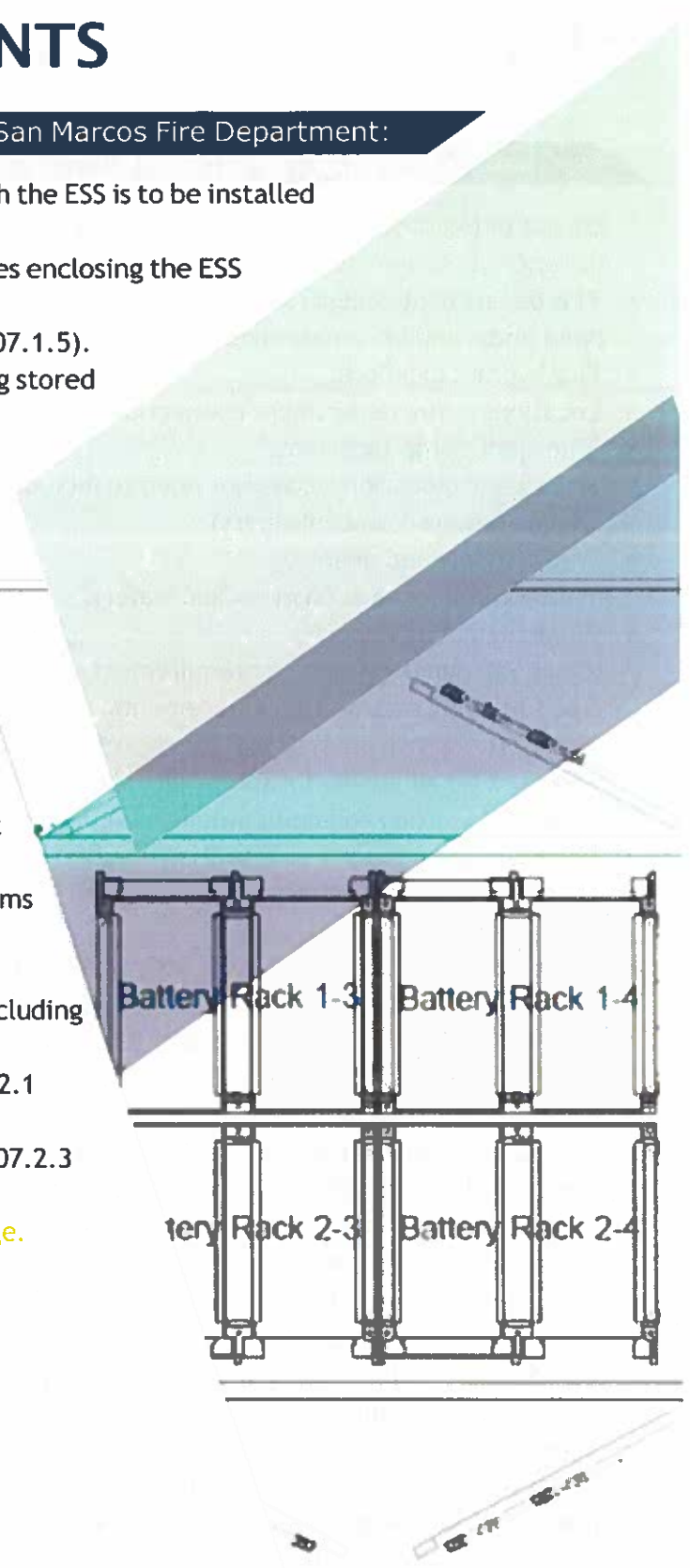
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SUBMITTAL REQUIREMENTS

The following must be submitted for review to the San Marcos Fire Department:

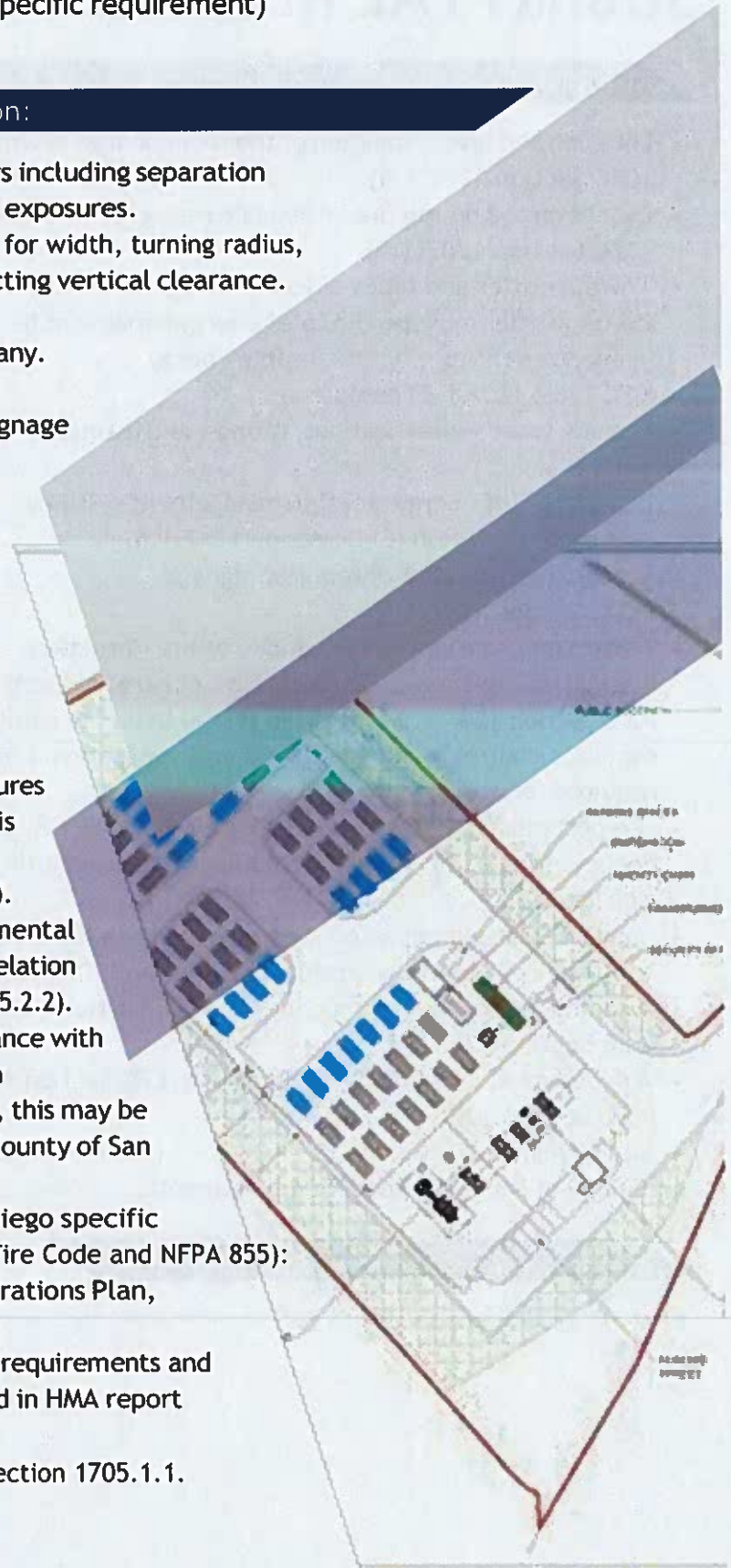
- Location and layout diagram of the room or area in which the ESS is to be installed (CFC Section 1207.1.5).
- Details on the hourly fire-resistance ratings of assemblies enclosing the ESS (CFC Section 1207.1.5).
- The quantities and types of ESS to be installed (CFC 1207.1.5). ESS Capacities must be the total energy capable of being stored (nameplate rating), not the usable energy. (CFC Table 1207.1.3 Footnote a)
- Manufacturer's specifications, ratings, and listings of each ESS.
- Description of energy storage management systems and their operation (CFC Section 1207.1.5)
- Location and content of required signage (CFC Section 1207.1.5)
- Details on fire suppression, smoke or fire detection, thermal management, and **explosion control system** (CFC Section 1207.1.5 - modified text in **BOLD** to clarify explosion control requirement - exhaust ventilation is not required for lithium-ion).
- A report must be provided for all explosion control systems documenting compliance with appropriate standards (see next section).
- Support arrangement associated with the installation, including any required seismic restraint (CFC Section 1207.1.5).
- A commissioning plan complying with CFC Section 1207.2.1 (CFC Section 1207.1.5).
- A decommissioning plan complying with CFC Section 1207.2.3 (CFC Section 1207.1.5).
- Site plan including the [information found on the next page](#). (County of San Diego specific requirement).



SITE PLAN (County of San Diego specific requirement)

Site plan must include the following information:

- Layout of buildings containing ESS or ESS containers including separation distances between buildings/containers and from exposures.
- Fire department access roads including dimensions for width, turning radius, dead ends, and information on any objects obstructing vertical clearance.
- Fire hydrant locations.
- Locations of fire department connections (FDC), if any.
- Emergency stop locations.
- Site signage locations (does not need to include signage that is required on containers)
- Water supply and quantity (not required for sites on municipal water).
- Plume Modeling Report (County of San Diego specific requirement). See following section for requirements.
- Hazard mitigation analysis (CFC Section 1207.1.6). Required for all facility locations, including remote outdoor facilities and dedicated use buildings.
- Documentation for any additional protection measures that are required by the hazard mitigation analysis (CFC Section 1207.1.6).
- Large-scale fire test report (CFC Section 1207.1.7). The test report must be accompanied by a supplemental report that provides interpretation of test data in relation to installation requirements (NFPA 855 Section 9.1.5.2.2).
- Report outlining Fire Code compliance and compliance with these guidelines. Any of the above documentation may be included as part of this report (for example, this may be combined with the hazard mitigation analysis). (County of San Diego specific requirement)
- Emergency preparedness plans (County of San Diego specific requirement, also required by 2024 International Fire Code and NFPA 855):
- Fire Safety and Evacuation Plan, Emergency Operations Plan, Emergency Response Plan, &
- Maintenance Plan outlining testing and inspection requirements and intervals for all safety systems that are referenced in HMA report (County of San Diego specific requirement).
- Special inspection plan in accordance with CBC Section 1705.1.1.



REPORTS REQUIRED

The following documents must be prepared by a qualified Fire Protection Engineer or by a consultant on the County of San Diego California Environment Quality Act Consultant List. Reports may be combined as desired by the applicant:



- Plume modeling report



- Site specific hazard mitigation analysis



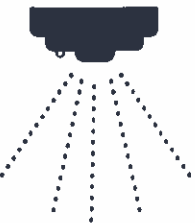
- Explosion control system calculation report*



- Emergency preparedness plans and emergency response plan.



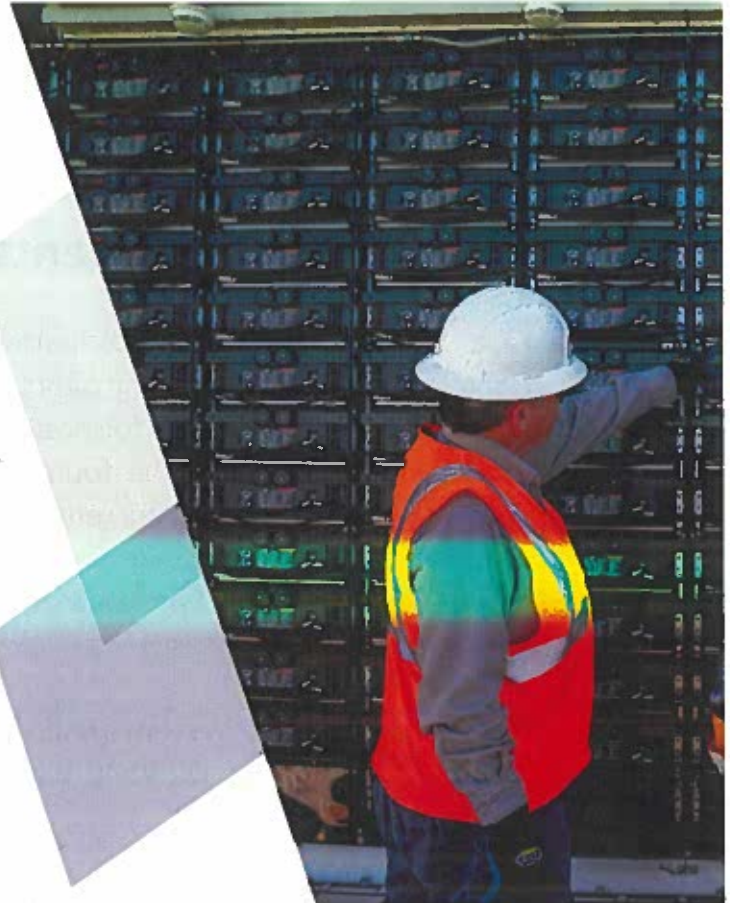
- Fire alarm design documents for parts of system that are not included in a pre-engineered system's listing documents*



- Fire protection design documents for parts of system that are not included in a pre-engineered system's listing documents*



- Report to demonstrate compliance with applicable requirements of the California Fire Code, with these guidelines, and applicable codes and standards. Site specific information may be contained in a separate report from any pre-engineered system documentation if desired by the applicant.



* These items are not required to be prepared by the qualified Fire Protection Engineer on the County of San Diego California Environment Quality Act Consultant List, however these documents must be reviewed for conformance with the California Fire Code, with these guidelines, applicable codes and standards, and any project specific requirements. A "review by stamp" or review letter documenting acceptance.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



1. ESS and Major components must be appropriately listed:

- Listings must be by an Occupational Health and Safety Administration (OSHA) Nationally Recognized Testing Laboratory (NRTL). The NRTL must be recognized for the specific standard and performed by a laboratory listed on OSHA's website. This list is updated regularly and can be found at: <https://www.osha.gov/nationally-recognized-testing-laboratory-program/current-list-of-nrtls>
- UL 9540 listing must be Edition 3 or more recent. (CFC Section 1207.3.1 and Chapter 80 "Referenced Standards")
- Battery management system (BMS) or thermal runaway protection system must be included in UL 1973 or UL 9540 listing. (CFC Section 1207.6.5 and NFPA 855 Section 9.6.5.2)
- Inverters must be listed in accordance with UL 1741 and compatible with the battery system or included in UL 9540 listing. (CFC Section 1207.3.3).
- Fire alarm, detection, and suppression devices must be provided with appropriate UL listings.

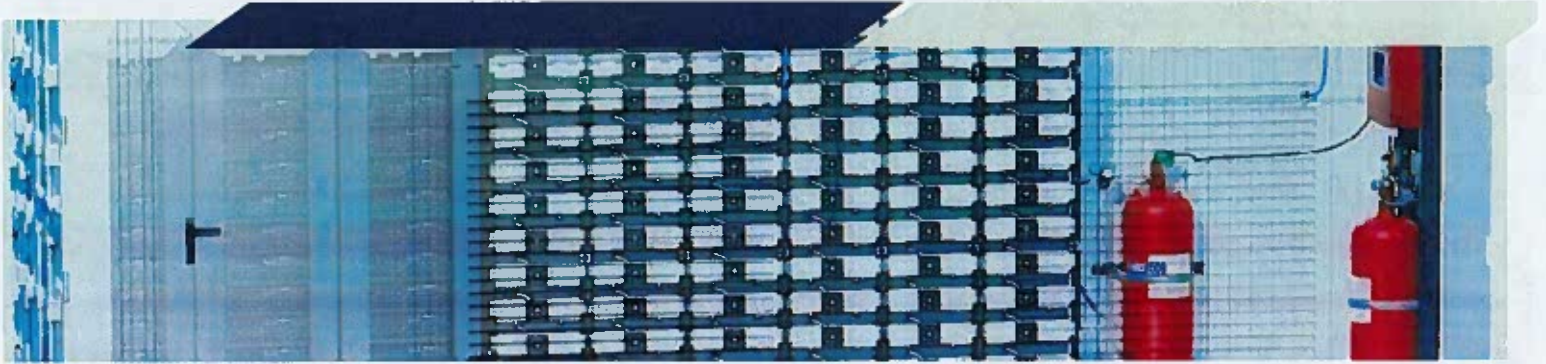
The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



2. Large-scale fire testing is required for all installations subject to these TESTING guidelines. Testing shall be conducted by an approved testing laboratory (must be a NRTL or approved on case-by-case basis). UL 9540A or equivalent testing reports must be provided at a minimum (CFC Section 1207.1.7).

- UL 9540A testing must be a minimum of cell, module, and unit level testing. Installation level testing must be provided when utilizing alternative fire suppression systems (see below) or when performance criteria for unit level test was not met.
- Testing that is performed beyond the scope of UL 9540A may be provided in addition to UL 9540A. This may include testing in accordance with CSA TS-800 or testing that involved intentional ignition of battery off-gas to assess the fire propagation hazard. At this time, this is not required to meet a specific test standard and will be evaluated individually for each project as CSA TS-800 is the only test standard currently on the market and was recently released.
- All testing must be provided with a supplemental report that provides interpretation of test data in relation to installation requirements (NFPA 855 Section 9.1.5.2.2). This requirement may be covered by other reports if sufficient detail is provided in the Code Compliance report or the HMA.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



3. Fire suppression is not required for outdoor containers that are not walk-in units (CFC Section 1207.5.5). Fire suppression is required for buildings, unless permitted to be omitted in accordance with CFC Table 1207.7 Note C. When fire suppression is provided as a required or optional system, the following requirements apply:

- Installation of automatic sprinkler systems shall be in accordance with CFC Section 903.1.1. Sprinkler system density shall be in accordance with NFPA 855 Section 4.9.3.
- Where fire suppression is required (either by UL 9540 listing or by CFC), installation of water spray or water mist suppression systems shall be based on installation-level UL 9540A or equivalent testing. Where an optional fire suppression system is provided (i.e. in a enclosure that did not require installation-level testing), testing is not required but is recommended.
- Installation of alternative fire suppression systems that are not water-based is not recommended for the suppression of a fire involving the battery system. Installation of these systems will be approved only on a case-by-case basis as an optional system when shown to not have negative interaction with other safety systems (such as an NFPA 69 system). Where fire suppression is required, a water-based suppression system shall also be provided, as recommended by NFPA 855 Appendix G.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



4. Fire detection systems shall be provided for all facilities and transmit alarm signals in accordance with CFC Section 1207.5.4. For outdoor installations where detection systems are not provided in the enclosures, a fire detection system must be installed outside of the enclosures.

- Fire detection systems must comply with CFC Section 907.2 and NFPA 72.
- Fire detection systems must activate the fire alarm system with occupant notification where ESS are installed in a building with other occupancies.
- Sites with multiple fire alarm panels must be aggregated to a master panel at an approved location. This location must be included in the emergency response plan and evaluated in the hazard mitigation analysis (NFPA 855 Section 4.8.2.2 and A.4.8.2.2).

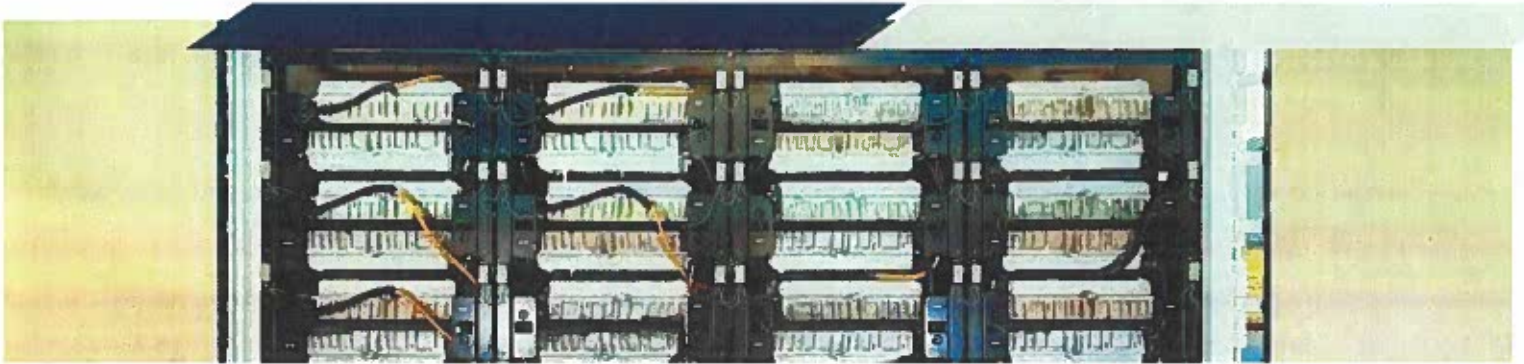
The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



5. Explosion control is required to be provided for all rooms, areas, ESS cabinets, or ESS walk-in units (CFC Section 1207.6.3 – ESS cabinets added for clarification based on 2024 International Fire Code and NFPA 855). Explosion control systems must be designed, installed and maintained in accordance with the following:

- NFPA 68 or NFPA 69. ESS cabinets may also meet NFPA 855 Section 9.6.5.6.4 in lieu of providing an NFPA 68 or NFPA 69 system. Proposed projects utilizing BESS units with only NFPA 68 explosion control systems should complete a performance-based design considering the type of combustible gases generated during the cell-, module-, and installation-level test under UL 9540A.
- All requirements of NFPA 855 Section 9.7.6.7 as applicable to the selected system.
- A report must be provided documenting the approach and compliance with the entirety of applicable standards.
- All critical components of NFPA 69 systems must be provided with a standby power system meeting the requirements of CFC Section 1203. The standby power must be sized to provide power for 24 hours of standby time for the gas detection system and for the expected single battery enclosure failure event duration in “alarm” for all components. This duration is to be documented in the NFPA 69 report or in the HMA.
- The report provided for an NFPA 68 system must include fireball size which must be incorporated into the site layout and emergency planning.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



6. A hazard mitigation analysis is required for all facilities subject to these interim guidelines.

- The hazard mitigation analysis must address the fault conditions indicated in CFC Section 1207.1.6.1 and NFPA 855 Section 4.4.2. The failure of each safety system during a thermal runaway event must be evaluated. The failure of multiple safety systems at the same time is not required to be evaluated.
- Other credible failure scenarios must be evaluated as appropriate, including but not limited to the following: Seismic events; Flame impingement due to a wildfire; Thermal runaway conditions beyond the requirements of CFC Section 1207.1.6.1. This includes failure that could result in a partial volume deflagration and a failure of all cells.
- Mitigation strategies must consider site specific limitations, such as those outlined in NFPA 855 Appendix G.3.3. This may include, but is not limited to, lack of or minimal water supply, delayed response time due to site location, configuration of site layout impact on fire department response, and presence of personnel on site to assist in early-stage emergency operations.
- Where 100-foot setback from lot lines is not required, the HMA must address the appropriate minimum distance of containers from lot lines needed to achieve the analysis approval criteria or confirm that code required minimums are sufficient.
- Analysis approval is as outlined in NFPA 855 Section 4.4.3.
- Additional mitigation measures must be clearly identified in the HMA and addressed by project documentation.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



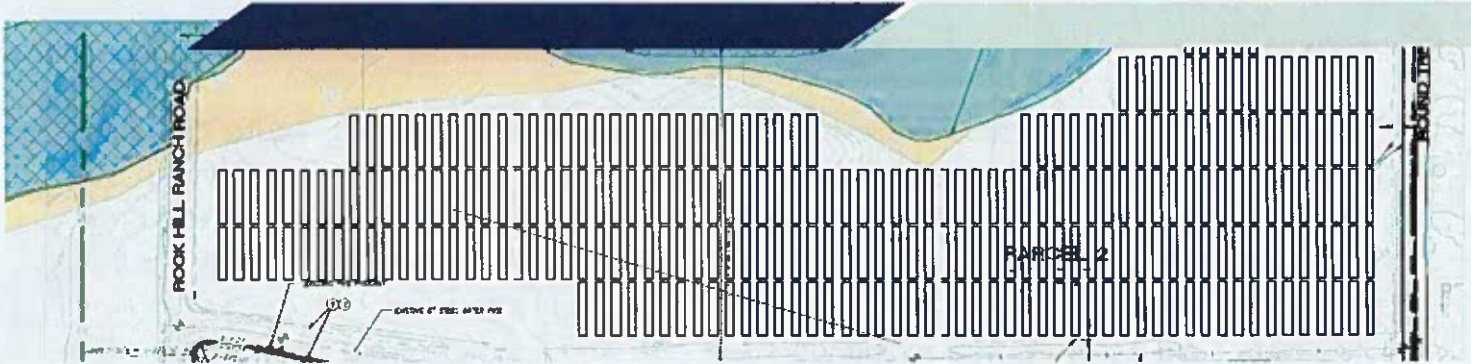
7. Plume modeling must be provided meeting the following:

- The following software list is pre-approved. Others may be approved on a case-by-case basis:
 - AERMOD
 - Fire Dynamics Simulator (FDS)
 - Process Hazard Analysis Software (PHAST)
 - SCICHEM
- The following baseline meteorological conditions must be assessed. (Where available, site specific wind roses shall be used to inform plume orientation, and wind-speed sensitivity shall be evaluated):
 - Wind speed of 1.5 meters per second (3.4 miles per hour).
 - Ambient temperature of 77 °F.
 - Atmospheric stability class F.
- A parametric study must also be performed evaluating wind speed sensitivity. Local meteorological conditions found at the site must be modeled.
- Failure scenarios: Dispersion modeling evaluates flammability and toxicity hazards for all credible battery failure scenarios, including both flaming and non-flaming conditions.
Following scenarios are recommended for flaming conditions:
 - Full propagation within a single BESS enclosure.
 - Multiple BESS enclosures where propagation is demonstrated by UL 9540A testing or is otherwise reasonably expected.Following scenarios are recommended for non-flaming conditions:
 - Non-flaming propagation demonstrated in UL 9540A test with reasonable conservatism to capture a credible conservative scenario.

Plume Modeling cont.

- Expected toxin(s) to be considered must be documented and justified. Acute Exposure Guideline Level 1 (AEG1-1) must be used. The exposure time must be documented and justified. Dispersion modeling shall distinguish between near-field and far-field exposure regions. Toxicity thresholds and exposure durations shall be selected based on the applicable population and scenario.
 - Near-field exposure (first responders / on-site workers) Near-field exposure shall be evaluated using IDLH (Immediately Dangerous to Life or Health) criteria. Concentrations shall be evaluated at human breathing height, and near-field setback distances shall include an appropriate factor of safety.
 - Far-field exposure (Public and elevated structures) Far-field exposure shall be evaluated using AEG1-2 (Acute Exposure Guideline Level- 2) criteria with an exposure duration selected based on the modeled scenario and credible public exposure.
- Dispersion modeling shall be performed using three meteorological condition sets:
 - worst-case dispersion conditions consistent with U.S. EPA guidance, defined by a wind speed of 1.5 m/s (3.4 mph), Pasquill Stability Class F, and representative ambient temperature, relative humidity, and surface roughness;
 - representative summer conditions based on long-term site-specific meteorological data, with wind speed, atmospheric stability, temperature, and humidity derived from summer averages and surface roughness representative of site land use; and
 - representative winter conditions based on site-specific historical data, with wind speed, atmospheric stability, temperature, and humidity representing winter conditions and surface roughness consistent with site land use.
- The report must identify additional measures to be taken to protect nearby people if found to be necessary based on modeling efforts.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



8. 100-foot setbacks are required from lot lines where residential, educational, or institutional occupancies are located. The 100-foot setback is applicable to battery systems, and other ESS/utility components that are located within 100 feet of lot lines. Separation distances to other exposures and to lot lines to other occupancies are based on current code required minimums, or as documented in the HMA.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



9. Separation distances between BESS enclosures are required to be as follows:

- A minimum of 10 feet where no justification for a reduction is provided.
- Distances based on testing which intentionally initiates a fire in an ESS enclosure to evaluate propagation to adjacent enclosures. UL 9540A testing does not include this test procedure and is not considered to meet this requirement. Test procedures and outcomes must be documented in a test report provided by the third-party laboratory that performed the test or in a report prepared by a registered design professional.
- Distances based on other justifications such as fire rating of enclosures or fire exposure analysis may be considered. Justifications must be presented as a report or part of a report prepared by a fire protection engineer.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



10. Emergency preparedness plans are required for all facilities as follows:

- Fire Safety and Evacuation Plan in accordance with CFC Section 404. May be omitted when approved by AHJ for sites that are not regularly occupied, including by maintenance and operations personnel.
- Emergency Operations Plan complying with NFPA 855 Section 4.3.2.1. Emergency operations plan must address any response from on-site personnel that is included as a mitigation strategy in the HMA.
- Emergency Response Plan. See NFPA 855 Appendix G.1 for guidance. Emergency response plan must address any expected response from the fire department that is included as a mitigation strategy in the HMA.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



11. Fire apparatus access roads are required for all facilities and must meet the requirements of CFC Section 503 and the SD County Consolidated Fire Code. The following specific considerations are noted:

- Roads must extend within 150 feet of all portions of the facility, which includes BESS units.
- Location of the road with respect to BESS enclosures that may make access difficult or impossible during an incident must be considered (for example, a road that is in the direction of a deflagration vent within the calculated fireball distance).
- The fire code official has the authority to make additional requirements where necessary in accordance with CFC Section 503.2.2.
- Any impacts due to modifications to fire apparatus access roads that are granted must be documented in the HMA and emergency response plan.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



12. Water supply is required for all facilities in accordance with CFC Section 507.

- For sites with buildings, the requirements of CFC Appendix B or the Insurance Service Office “Guide for Determination of Fire Flow” are applicable.
- For sites without buildings the fire flow shall be calculated as follows:
 - The fire flow rate shall be 250 gpm.
 - The duration is based on expected event duration as determined by required fire testing or a reduced duration approved on a case-by-case basis. The reduced duration is permitted based on spacing of ESS enclosures, reducing likelihood of propagation and on fire department ability to provide alternative water supply.
- Fire hydrant systems must meet the requirements of CFC Section 507.5 and CFC Appendix C. Additional fire hydrants may be required as needed to assist in fire department response efforts.
- Where fire sprinkler systems are provided, fire flow shall be the greater of the fire sprinkler system demand including hose stream allowance or the calculated fire flow.
- Where nonmechanical ESSs are installed, they shall be provided with a permanent source of water for fire protection. Where no permanent adequate and reliable water supply exists for firefighting purposes, the requirements of NFPA 1142 shall apply (NFPA 855 Section 4.9.5).
- Accessible fire hydrants shall be provided for site ESS installations where a public or private water supply is available (NFPA 855 Section 4.9.5.3).
- Fire flow rate for buildings containing ESS shall be calculated as stated in Item 14a, with a duration of 2 hours. SDCFPD will establish a plan to supply additional water utilizing this 2-hour window

Water Supply cont.

- Fire flow needed to control spread of fire from other equipment located on site, such as transformers, shall be based on an engineering analysis that is provided for review.
- The fire flow for the site shall be based on the greatest calculated fire flow from the methods above as applicable. For example, for a site consisting of outdoor ESS enclosures and an ancillary building, the fire flow is the greater of that calculated for the building and that calculated for the ESS enclosures.
- Where an adequate and reliable water supply system for firefighting purposes does not otherwise exist, NFPA 1142 may be used. However, the minimum water supply quantity must still be based on the methods outlined above. NFPA 1142 water supply quantity is based on structural protection and does not contain guidance for special fire protection hazards.

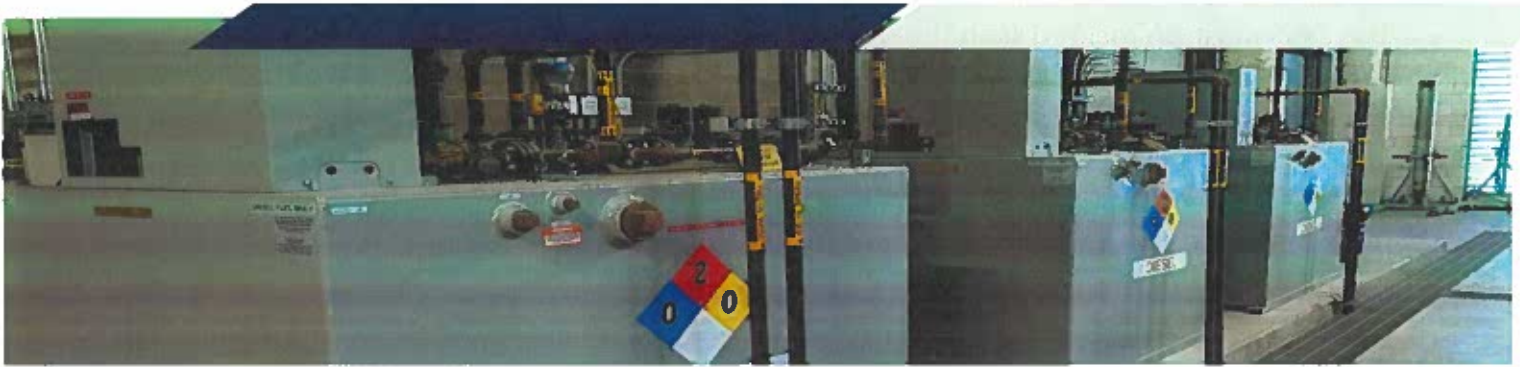
The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



13. Use of any protection technology that is not required or addressed by current codes or standards may be approved on a case-by-case basis. Approval will be based on the following:

- Testing and/or analysis by a reputable third party demonstrating the effectiveness of the technology when used in lieu of providing a code required protection system (i.e. an emerging suppression system being utilized in lieu of a code required sprinkler system).
- Testing and/or analysis by a reputable third party demonstrates that the technology will not have negative interactions with other safety systems.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.



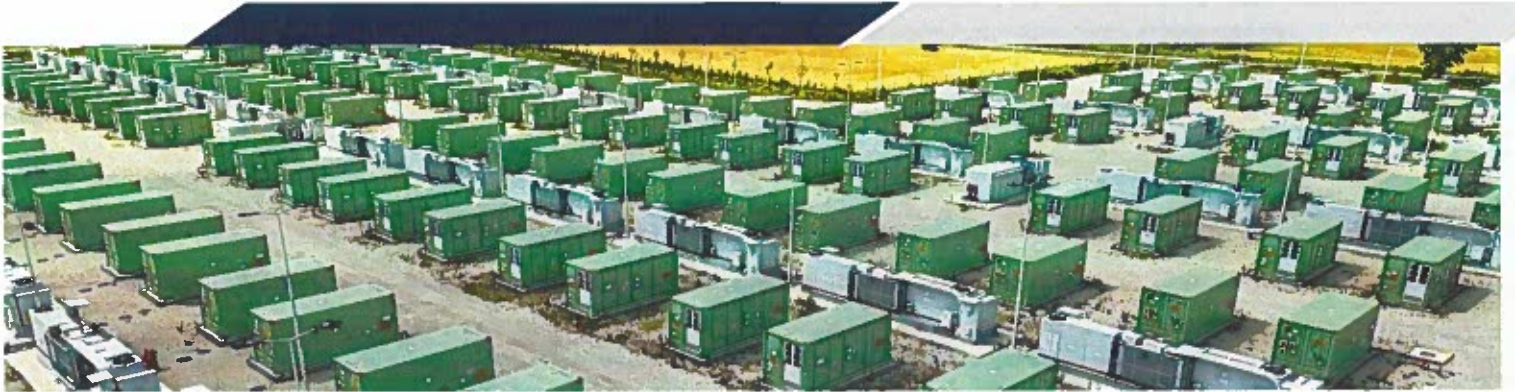
14. All safety systems that rely on power must be provided with a reliable emergency power supply system (EPSS) in accordance with CRC Section 1203 and NFPA 855 Section 4.10 :

- The EPSS installation must comply with these requirements, CFC Section 1203, NFPA 110, NFPA 111, and the California Electrical Code (CEC).
- Transfer must occur within 10 seconds after primary power is lost. The transfer time is permitted to be increased if evaluated as part of the HMA and a safe critical infrastructure load transfer. Transfer time may also be met by the combination of multiple systems (such as a UPS and a generator).
- The load requirements shall be determined by a registered design professional with an EPSS design background. The duration shall include a 48-hour period of standby time (prior to a failure) and an active duration of at least 48-hours (SDCFPD specific requirement) for new facilities located within Fire Threat Area Tier 3 (Extreme) as indicated on the CPUC Fire Threat Map in Section XI of this document. The 48-hour active duration is to address internal failures of the BESS during a Public Safety Power Shutoff. Existing facilities shall have an active duration based on the expected event duration of one BESS in failure and an additional BESS unit as a safety margin per NFPA 855 Section A.4.10.2.1.
It is important to also note that pre-emptive transfer to an emergency power supply prior to grid de-energization by the BESS operator is acceptable.
- All BESS protection systems (e.g. ventilation, suppression, management systems) will need to be provided with an EPSS sized for an active duration of 48-hours for new facilities, and an active duration sized based on the HMA for an existing facility (SDCFPD specific requirement).

EPSS Requirement cont.

- The EPSS must be located such that a failure event of the BESS does not compromise the operation of the system per NFPA 855 Section 4.10.4.
- Acceptable means of emergency power supply can be determined based on CEC Section 700.12. Stored energy systems are considered ESS and must also meet the requirements of the CFC/these guidelines as applicable.
- Systems that are provided with backup power from a fire alarm system are not required to be included in loads for the EPSS when the fire alarm system is sized for the minimum load durations as determined above.
- The safety systems that may require power from the EPSS include but are not limited to the following:
 - Smoke detection
 - Fire detection
 - Fire suppression
 - Explosion control
 - Gas detection
- The CFC does not provide the following exception however, per NFPA 855 Section 4.10.5, EPSS shall not be required on mechanical ventilation systems for all types of lead-acid, aqueous nickel-based, and aqueous metal-air batteries used in ESS in stationary standby service that complies with any of the following:
 - Comprised of vented cells in systems 600 V dc or less
 - Comprised of cells or batteries listed to UL 1973 in systems 600 V dc or less
 - Used for control of substations and control or safe shutdown of generating stations under the exclusive control of the electric utility and located outdoors or inbuilding spaces used exclusively for such installations
 - Used for control of fixed guideway transit or passenger rail systems under the exclusive control of a transit authority and located outdoors or in building spaces used exclusively for such installations.
 - Are less than 60 V dc in telecommunications facilities for installations of communications equipment under the exclusive control of communications utilities and located outdoors or in building spaces used exclusively for such installations
 - Utilized in uninterruptible power supplies listed to UL 1778, which occupy no more than 10 percent of the floor area on the floor on which they are located.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.

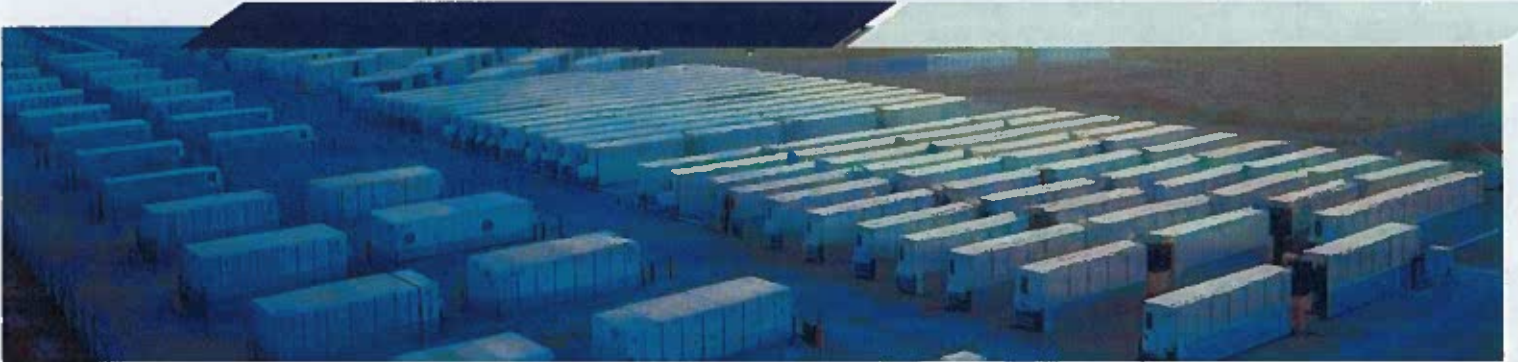


15. Required Commissioning, Inspection, Testing & Maintenance:

Commissioning and Maintenance plans must address the following, at a minimum:

- Manufacturer's specified commissioning and maintenance procedures.
- Periodic inspection and testing intervals and procedures must be noted in the maintenance plans and performed in accordance with manufacturer's recommendations, any deviations noted in the HMA, and in accordance with applicable codes and standards such as NFPA 13, NFPA 25, NFPA 72, and NFPA 69. The maintenance plan must be submitted as part of the permit documents and is subject to approval.
- Systems that are designed in accordance with NFPA 69 must initially be inspected and tested at 3-month intervals. This duration may be increased or decreased based on a hazard analysis and based on performance after multiple inspection intervals.
- Where two or more integrated critical safety systems are present, the systems shall be tested in accordance with NFPA 4. Testing shall be conducted prior to certificate of occupancy and at 5-year intervals during the operation of the facility.
- Records of completed testing are required to be kept on site in hard copy form and be available to San Marcos Fire Department upon request.

The following requirements must be demonstrated as being met by the documents required above, and any additional documents as needed. This list is not intended to be inclusive, and all requirements of CFC Section 1207 must be met.

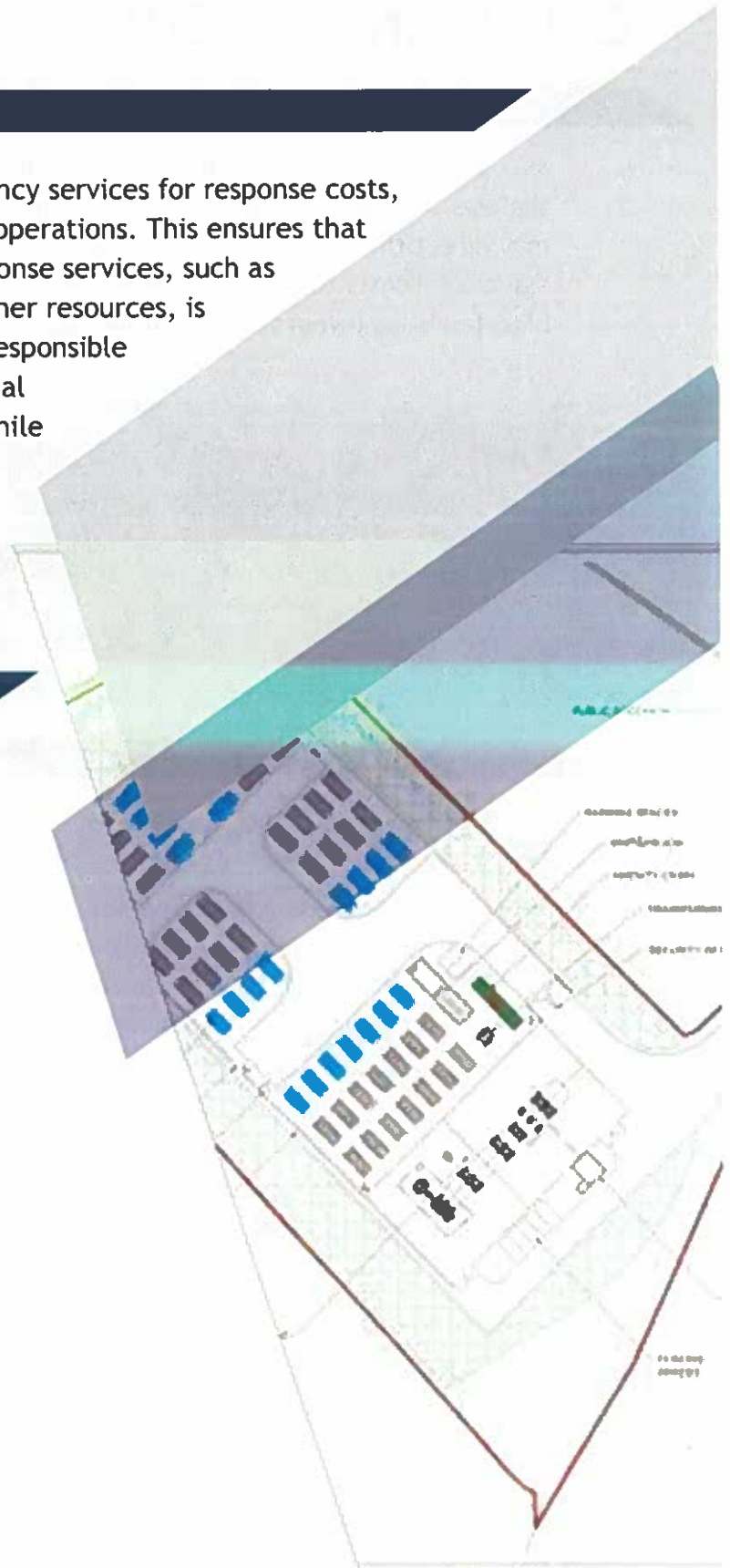


16. Workforce Requirements for Battery Energy Storage Systems:

All installation, maintenance, modification and repair of a battery energy storage system with a capacity greater than 80kwh must be performed by C-10 licensed electrical contractors.

COST RECOVERY

- Facility owners must reimburse emergency services for response costs, ensuring sustainability of public safety operations. This ensures that the financial burden of emergency response services, such as personnel, equipment, logistics, and other resources, is reimbursed by BESS facility owners or responsible parties. This approach promotes financial sustainability for emergency services while prioritizing public safety and environmental protection. Additionally, these requirements will be periodically reviewed and updated to current operational costs.



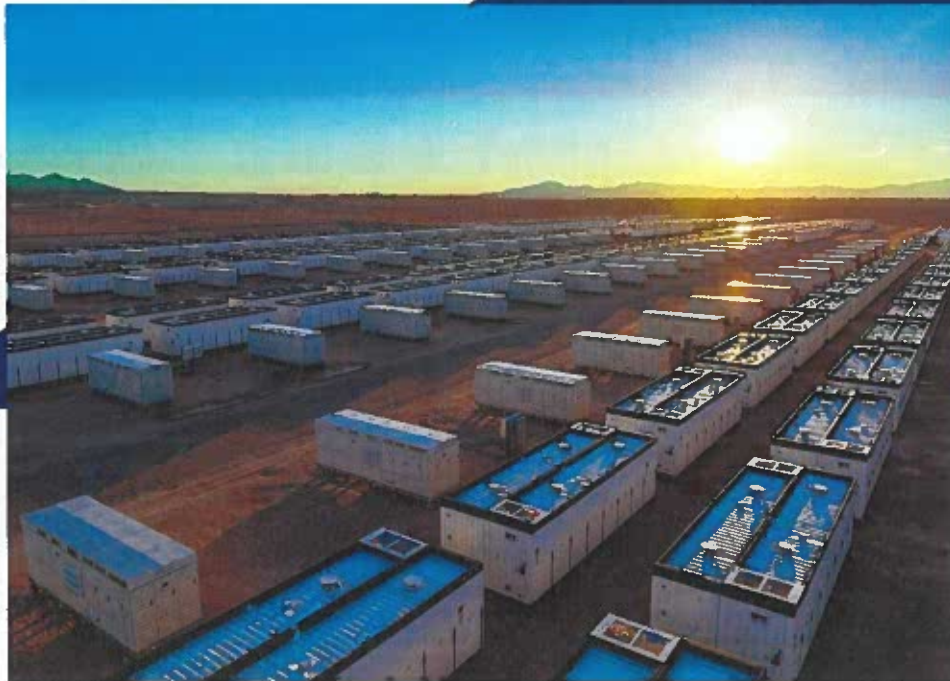
CAUSE AND ORIGIN

- As a part of cause and origin for fires in BESS facilities root cause analysis shall be conducted by the Fire Chief, their designee, or the fire chief may direct the owner to hire an approved third-party. Any associated costs to conduct the analysis shall be borne by BESS facilities owners or responsible parties.



Existing facilities must provide the following documentation:

- HMA where the facility utilizes equipment that is not UL 9540 listed.
- All emergency planning documents that are required for new facilities:
 - Fire Safety and Evacuation Plan in accordance with CFC Section 404. May be omitted when approved by AHJ for sites that are not regularly occupied, including by maintenance and operations personnel.
 - Emergency Operations Plan complying with NFPA 855 Section 4.3.2.1.
 - Emergency Response Plan. See NFPA 855 Appendix G.10.9 and the SDCFPD ERP Template for guidance.





City of San Marcos



San Marcos Fire Department

GENERAL PREVAILING WAGE DETERMINATION MADE BY THE DIRECTOR OF INDUSTRIAL RELATIONS PURSUANT TO CALIFORNIA LABOR CODE PART 7, CHAPTER 1, ARTICLE 2, SECTIONS 1770, 1773 AND 1773.1 FOR COMMERCIAL BUILDING, HIGHWAY, HEAVY CONSTRUCTION AND DREDGING PROJECTS

LOCALITY: SAN DIEGO COUNTY

DETERMINATION: SDI-2026-1

CRAFT	CLASSIFICATION	CRAFT FOOTNOTE	ISSUE DATE	EXPIRATION DATE	BASIC HOURLY RATE	BASIC HOURLY RATE FOOTNOTE	HEALTH AND WELFARE	HEALTH AND WELFARE FOOTNOTE	PENSION	PENSIO FOOTNO
#BRICKLAYER:			02/22/2026	10/31/2026**	\$50.090	A	\$9.250		\$9.610	
#BRICKLAYER:	MASON FINISHER		02/22/2026	10/31/2026*	\$38.350	A	\$9.250		\$9.610	
#BRICK TENDER			02/22/2026	04/30/2026*	\$42.600		\$9.550		\$8.780	
#CARPET LAYER:	RESILIENT TILE LAYER		02/22/2026	12/31/2026**	\$43.520	H	\$5.000		\$11.220	
#DRYWALL FINISHER			02/22/2025	03/31/2025*	\$43.590	K	\$8.800		\$10.010	
#ELECTRICIAN:	INSIDE WIREMAN, TECHNICIAN		02/22/2026	05/31/2026**	\$58.950		\$9.210		\$7.000	M
#ELECTRICIAN:	CABLE SPLICER		02/22/2026	05/31/2026**	\$59.700		\$9.210		\$7.000	M
#ELECTRICIAN:	TUNNEL WIREMAN		02/22/2026	05/31/2026**	\$66.320		\$9.210		\$7.000	M
#ELECTRICIAN:	TUNNEL CABLE SPLICER		02/22/2026	05/31/2026**	\$67.160		\$9.210		\$7.000	M
#ELECTRICIAN:	SOUND AND SIGNAL TECHNICIAN		02/22/2026	05/31/2026*	\$45.230		\$9.210		\$5.000	M
#ELECTRICIAN:	STREETLIGHTING, TRAFFIC SIGNAL, UNDERGROUND SYSTEMS JOURNEYMAN TECHNICIAN GRADE 1	P	02/22/2026	05/31/2026**	\$43.620		\$8.250		\$4.250	M
ELECTRICIAN:	TECH GRADE 2	P	02/22/2026	05/31/2026**	\$33.100		\$8.250		\$4.250	M
ELECTRICIAN:	TECH GRADE 3	P	02/22/2026	05/31/2026**	\$31.050		\$8.250		\$4.250	M
#FIELD SURVEYOR:	CHIEF OF PARTY (018.167-010)	R	02/22/2026	06/30/2026**	\$67.910		\$15.200		\$16.150	
#FIELD SURVEYOR:	INSTRUMENTMAN (018.167-034)	R	02/22/2026	06/30/2026**	\$60.260		\$15.200		\$16.150	
#FIELD SURVEYOR:	CHAINMAN/RODMAN (869.567-010)	R	02/22/2026	06/30/2026**	\$59.680		\$15.200		\$16.150	
#GLAZIER			02/22/2026	09/30/2026*	\$55.400	I	\$6.030		\$10.910	
#MARBLE FINISHER			08/22/2025	05/31/2026**	\$45.560	H	\$9.250		\$6.020	
#PAINTER:	PAINTER, LEAD ABATEMENT	Y	08/22/2025	06/30/2026**	\$43.420	A	\$9.200		\$6.040	
#PAINTER:	INDUSTRIAL PAINTER	Y	08/22/2025	06/30/2026**	\$47.320	A	\$9.200		\$6.040	
PAINTER:	GRAFFITI REMOVAL WORKER JOURNEYMAN (APPLIES ONLY TO PAINT-OVER METHOD)	AA	02/22/2026	01/31/2027**	\$30.450	H	\$8.000		\$1.120	
PAINTER:	GRAFFITI REMOVAL WORKER 1 (APPLIES ONLY TO PAINT-OVER METHOD)	AD	02/22/2026	01/31/2027**	\$20.950	H	\$8.000		\$1.120	
PAINTER:	GRAFFITI REMOVAL WORKER 2 (APPLIES	AE	02/22/2026	01/31/2027**	\$21.820	H	\$8.000		\$1.120	

CRAFT	CLASSIFICATION	CRAFT FOOTNOTE	ISSUE DATE	EXPIRATION DATE	BASIC HOURLY RATE	BASIC HOURLY RATE FOOTNOTE	HEALTH AND WELFARE	HEALTH AND WELFARE FOOTNOTE	PENSION	PENSIO FOOTNO
	ONLY TO PAINT-OVER METHOD)									
#PLASTERER			08/22/2025	07/31/2026*	\$46.180		\$9.630		\$11.310	
#PLASTER TENDER		AI	02/22/2026	08/04/2026*	\$48.720		\$9.550		\$11.970	
PLASTER TENDER	PLASTER CLEAN-UP LABORER		02/22/2026	08/04/2026*	\$46.170		\$9.550		\$11.970	
#PLUMBER:	PLUMBER, INDUSTRIAL AND GENERAL PIPEFITTER		02/22/2026	08/31/2026**	\$61.730	AM	\$9.360		\$14.350	AN
#PLUMBER:	SEWER AND STORM DRAIN PIPELAYER		02/22/2026	08/31/2026**	\$48.840	AM	\$9.250		\$11.500	AN
PLUMBER:	SEWER AND STORM DRAIN PIPE TRADESMAN	AS	02/22/2026	08/31/2026**	\$24.150	AI	\$9.500		\$0.380	
#PLUMBER:	SERVICE & REPAIR (PLUMBER/HVAC-FITTER)		02/22/2026	08/31/2026**	\$59.850	AM	\$9.360		\$14.040	AN
#PLUMBER:	LANDSCAPE/IRRIGATION FITTER		02/22/2026	08/31/2026**	\$44.750	H	\$9.360		\$14.350	AN
PLUMBER:	LANDSCAPE/IRRIGATION TRADESMAN	AW	02/22/2026	08/31/2026**	\$21.460	H	\$3.000		\$1.160	AN
#PLUMBER:	FIRE SPRINKLER FITTER (PROTECTION AND CONTROL SYSTEMS, OVERHEAD AND UNDERGROUND)		02/22/2026	03/31/2026**	\$52.530		\$13.600		\$14.000	AX
#ROOFER			02/22/2026	12/31/2026*	\$43.120	AY	\$9.310		\$3.170	
#ROOFER	PITCH WORK		02/22/2026	12/31/2026*	\$44.620	AY	\$9.310		\$3.170	
#SHEET METAL WORKER (HVAC)			08/22/2025	06/30/2026*	\$54.320	A	\$11.930	BB	\$18.260	BC
SHEET METAL WORKER (HVAC)	SHEET METAL TECHNICIAN	BE	08/22/2025	06/30/2026*	\$40.800	A	\$8.200	BB	\$1.250	BC
SHEET METAL WORKER (HVAC)	UTILITY WORKER	BG	02/22/2026	06/30/2026*	\$21.970		\$7.800	BB	\$0.000	BH
#TERRAZZO FINISHER			08/22/2025	08/31/2026*	\$45.130	I	\$9.250		\$4.710	
#TERRAZZO WORKER			08/22/2025	08/31/2026*	\$52.670	I	\$9.250		\$4.860	
#TILE FINISHER			08/22/2025	05/31/2026**	\$40.130	H	\$9.250		\$4.500	
#TILE LAYER			08/22/2025	05/31/2026**	\$54.360	H	\$9.250		\$9.850	

[Go to increase page](#)

FOOTNOTES

- * EFFECTIVE UNTIL SUPERSEDED BY A NEW DETERMINATION ISSUED BY THE DIRECTOR OF INDUSTRIAL RELATIONS. CONTACT THE OFFICE OF THE DIRECTOR - RESEARCH UNIT AT (415) 703-4774 FOR THE NEW RATES AFTER TEN DAYS AFTER THE EXPIRATION DATE IF NO SUBSEQUENT DETERMINATION IS ISSUED.
- ** THE RATE TO BE PAID FOR WORK PERFORMED AFTER THIS DATE HAS BEEN DETERMINED. IF WORK WILL EXTEND PAST THIS DATE, THE NEW RATE MUST BE PAID AND SHOULD BE INCORPORATED IN CONTRACTS ENTERED INTO NOW. CONTACT THE OFFICE OF THE DIRECTOR RESEARCH UNIT FOR SPECIFIC RATES AT (415) 703-4774.
- # INDICATES AN APPRENTICEABLE CRAFT. THE CURRENT APPRENTICE WAGE RATES ARE AVAILABLE ON THE INTERNET @ [HTTP://WWW.DIR.CA.GOV/OPRL/PWAPPWAGE/PWAPPWAGESTART.ASP](http://www.dir.ca.gov/OPRL/PWAPPWAGE/PWAPPWAGESTART.ASP).
- & THE BASIC HOURLY RATE AND EMPLOYER PAYMENTS ARE NOT TAKEN FROM A COLLECTIVE BARGAINING AGREEMENT FOR THIS CRAFT OR CLASSIFICATION.
- A INCLUDES AMOUNT WITHHELD FOR WORKING DUES.
- INCLUDES AN AMOUNT FOR INTERNATIONAL MASONRY INSTITUTE PROMOTION FUND

- B C SATURDAYS IN THE SAME WORK WEEK MAY BE WORKED AT STRAIGHT-TIME IF JOB IS SHUT DOWN DURING THE NORMAL WORKWEEK DUE TO INCLEMENT WEATHER, OR REASONS BEYOND THE CONTROL OF THE EMPLOYER.
- D RATE APPLIES TO THE FIRST 2 DAILY AND THE FIRST 8 SATURDAY OVERTIME HOURS WORKED. ALL OTHER OVERTIME IS PAID AT THE SUNDAY RATE.
- E INCLUDES AN AMOUNT PER HOUR WORKED FOR SUPPLEMENTAL DUES.
- F RATE APPLIES TO FIRST TWO DAILY OVERTIME HOURS WORKED; ALL OTHER OVERTIME IS PAID AT THE HOLIDAY OVERTIME HOURLY RATE.
- G RATE APPLIES TO THE FIRST 10 HOURS WORKED ON SATURDAY. ALL OTHER HOURS ARE PAID AT THE SUNDAY/HOLIDAY RATE.
- H INCLUDES AMOUNT WITHHELD FOR ADMINISTRATIVE DUES.
- I RATE APPLIES TO FIRST 4 DAILY OVERTIME HOURS; ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY RATE.
- J RATE APPLIES TO FIRST 8 HOURS. DOUBLE TIME THEREAFTER.
- K BASIC HOURLY RATE AND EMPLOYER PAYMENTS ARE BASED ON THE DAVIS-BACON WAGE DETERMINATION FOR THIS CRAFT.
- L RATE APPLIES TO ALL TIME WORKED IN EXCESS OF 8 HOURS PER DAY OR 40 HOURS PER WEEK.
- M IN ADDITION, AN AMOUNT EQUAL TO 3% OF THE BASIC HOURLY RATE IS ADDED TO THE TOTAL HOURLY RATE AND OVERTIME HOURLY RATES FOR THE NATIONAL EMPLOYEES BENEFIT BOARD. PURSUANT TO LABOR CODE SECTIONS 1773.1 AND 1773.8, THE AMOUNT PAID FOR THIS EMPLOYER PAYMENT MAY VARY RESULTING IN A LOWER TAXABLE BASIC HOURLY WAGE RATE, BUT THE TOTAL HOURLY RATES FOR STRAIGHT TIME AND OVERTIME MAY NOT BE LESS THAN THE GENERAL PREVAILING RATE OF PER DIEM WAGES.
- N RATE APPLIES TO THE FIRST 4 OVERTIME HOURS MONDAY THROUGH FRIDAY AND THE FIRST 8 HOURS WORKED ON SATURDAY. ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME RATE.
- O APPLIES TO THE FIRST 8 HOURS; ALL OTHER TIME WILL BE PAID AT DOUBLE THE STRAIGHT-TIME RATE. IF THE WORK WEEK IS TUESDAY THROUGH SATURDAY, THE SATURDAY FOLLOWING A RECOGNIZED HOLIDAY WHICH FALLS ON MONDAY, SHALL BE PAID AT 1 1/2 STRAIGHT-TIME HOURLY RATE.
- P THE FIRST WORKER ON THE SITE MUST BE A JOURNEYMAN TECHNICIAN GRADE #1 OR #2 OR ANY HIGHER PAID JOURNEYMAN CLASSIFICATION, SUCH AS JOURNEYMAN INSIDE WIREMAN; THEREAFTER THE CONTRACTOR MAY EMPLOY FIVE (5) JOURNEYMAN TECHNICIANS.
- Q RATE APPLIES TO THE FIRST 4 DAILY OVERTIME HOURS AND THE FIRST 8 HOURS WORKED ON SATURDAY. ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME RATE.
- R DICTIONARY OF OCCUPATIONAL TITLES, FOURTH EDITION, 1977, U.S. DEPARTMENT OF LABOR.
- S RATE APPLIES TO THE FIRST 4 DAILY OVERTIME HOURS AND THE FIRST 12 HOURS WORKED ON SATURDAY; ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME HOURLY RATE.
- T INCLUDES AMOUNT WITHHELD FOR DUES CHECK OFF.
- U IN THE EVENT CONDITIONS OR CIRCUMSTANCES WHICH ARE BEYOND THE CONTROL OF THE EMPLOYER, PREVENTS EMPLOYEES FROM WORKING ON ANY ONE OF THE REGULAR MONDAY THROUGH FRIDAY WORK DAYS, THEN SATURDAY MAY BE SCHEDULED AS A MAKE-UP DAY AT THE EMPLOYEE'S REGULAR STRAIGHT TIME RATE.
- V RATE APPLIES TO THE FIRST 2 DAILY OVERTIME HOURS AND THE FIRST 8 HOURS ON SATURDAY ONLY; ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME HOURLY RATE.
- W SATURDAY OVERTIME HOURLY RATE SHALL NOT BE OWED FOR WORK PERFORMED ON A SATURDAY UNLESS AND UNTIL THE EMPLOYEE HAS WORKED 8 HOURS ON THAT DAY OR 40 HOURS OVER THE COURSE OF THE WORK WEEK OF WHICH THE SATURDAY IS A PART, WHICHEVER COMES FIRST. RATE APPLIES TO THE FIRST 8 HOURS WORKED ON A SIXTH OR SEVENTH CONSECUTIVE DAY DURING ANY ONE CALENDAR WEEK UP TO 50 HOURS IN ANY ONE CALENDAR WEEK. ALL HOURS IN EXCESS OF 10 HOURS DAILY OR 50 HOURS WEEKLY ARE PAID AT THE HOLIDAY RATE. SATURDAYS IN THE SAME WORK WEEK MAY BE WORKED AT STRAIGHT-TIME IF JOB IS SHUT DOWN DURING THE NORMAL WORKWEEK DUE TO INCLEMENT WEATHER.
- X RATE APPLIES TO WORK ON HOLIDAYS ONLY; SUNDAYS ARE PAID AT THE SATURDAY OVERTIME HOURLY RATE.
- Y AN ADDITIONAL \$3.00 PER HOUR WILL BE ADDED TO THE BASIC HOURLY RATE WHEN PERFORMING PAPERHANGING WORK.
- Z DOUBLE TIME SHALL BE PAID FOR ALL HOURS WORKED OVER 12 HOURS IN ANY ONE DAY.
- AA RATE APPLIES AFTER 36 MONTHS OF EXPERIENCE
- AB RATE APPLIES TO ALL TIME WORKED IN EXCESS OF 8 HOURS IN ONE WORK DAY OR 40 HOURS IN ONE WORK WEEK MONDAY THROUGH SUNDAY; SATURDAY AND SUNDAY MAY BE WORKED AT THE STRAIGHT TIME RATE, PROVIDED THAT THE HOURS DO NOT EXCEED 8 HOURS IN ONE WORK DAY OR 40 HOURS IN ONE WORK WEEK.
- AC RATE APPLIES TO ALL HOURS IN EXCESS OF 12 HOURS IN ONE WORK DAY, MONDAY THROUGH SATURDAY, AND TO ALL HOURS WORKED IN EXCESS OF 8 HOURS ON SUNDAYS. RATE ALSO APPLIES TO WORK ON HOLIDAYS. FOR WORK ON SUNDAY, SEE SATURDAY OVERTIME HOURLY RATE AND FOOTNOTE.
- AD RATE APPLIES TO FIRST 12 MONTHS OF EXPERIENCE
- AE RATE APPLIES AFTER 12 MONTHS THROUGH 36 MONTHS EXPERIENCE
- AF INCLUDES AN AMOUNT PER HOUR WORKED OR PAID FOR DUES CHECK OFF

- AG SATURDAY IN THE SAME WORKWEEK MAY BE WORKED AT THE STRAIGHT-TIME HOURLY RATE IF IT IS NOT POSSIBLE TO COMPLETE FORTY HOURS OF WORK MONDAY THROUGH FRIDAY WHEN THE JOB IS SHUT DOWN DUE TO INCLEMENT WEATHER OR SIMILAR ACT OF GOD, OR BEYOND THE CONTRACTOR'S CONTROL.
- AH RATE APPLIES TO THE FIRST 8 HOURS WORKED; ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME HOURLY RATE.
- AI THE RATIO OF PLASTER TENDERS TO PLASTERERS SHALL BE AS FOLLOWS: THERE SHALL BE A PLASTER TENDER ON THE JOBSITE WHENEVER THERE IS A PLASTERER PERFORMING WORK ON THE JOBSITE, EXCEPT ON SMALL PATCH WORK WHERE ONLY ONE PLASTERER IS PERFORMING WORK. FOR INSIDE BROWN COATINGS THERE SHALL BE 2 PLASTER TENDERS FOR UP TO EVERY 3 PLASTERERS. FOR INSIDE FINISH COATINGS THERE SHALL BE 1 PLASTER TENDER FOR UP TO EVERY 3 PLASTERERS. ON OUTSIDE FINISH AND BROWN COATINGS AND FOR ALL OTHER WORK, THERE SHALL BE 1 PLASTER TENDER FOR UP TO EVERY 2 PLASTERERS.
- AJ INCLUDES AN AMOUNT PER HOUR WORKED OR PAID FOR SUPPLEMENTAL DUES.
- AK ALL WORK PERFORMED AFTER TWELVE (12) HOURS IN A DAY SHALL BE PAID AT THE SUNDAY/HOLIDAY RATE.
- AL RATE APPLIES TO THE FIRST EIGHT HOURS ON SATURDAY. ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME RATE. SATURDAY WORK MAY BE PAID AT THE STRAIGHT TIME RATE IF THE JOB IS SHUT DOWN DURING THE NORMAL WORK WEEK DUE TO INCLEMENT WEATHER.
- AM INCLUDES AN AMOUNT WITHHELD FOR ADMINISTRATIVE DUES WHICH IS NOT FACTORED INTO OVERTIME AND AN AMOUNT FOR VACATION WHICH IS FACTORED AT 1.5 TIMES FOR ALL OVERTIME.
- AN INCLUDES AMOUNT FOR NATIONAL PENSION AND RETIREE'S X-MAS FUND.
- AO AMOUNT INCLUDED IN BASIC HOURLY RATE AND FACTORED AT 1.5 TIMES FOR ALL OVERTIME.
- AP INCLUDES AN AMOUNT FOR THE P.I.P.E. LABOR MANAGEMENT COOPERATION COMMITTEE AND THE CONTRACTOR EDUCATION & DEVELOPMENT FUND.
- AQ RATE APPLIES TO THE FIRST 2 DAILY OVERTIME HOURS AND THE FIRST 10 HOURS ON SATURDAY; ALL OTHER TIME IS PAID AT THE SUNDAY AND HOLIDAY OVERTIME HOURLY RATE.
- AR SATURDAYS IN THE SAME WORK WEEK MAY BE WORKED AT STRAIGHT-TIME IF JOB IS SHUT DOWN DURING THE NORMAL WORKWEEK DUE TO INCLEMENT WEATHER.
- AS PIPE TRADESMEN SHALL NOT BE PERMITTED ON ANY JOB WITHOUT A JOURNEYMAN.
- AT INCLUDES AN AMOUNT WITHHELD FOR ADMINISTRATIVE DUES WHICH IS NOT FACTORED IN THE OVERTIME RATES.
- AU SATURDAY MAY BE WORKED AT STRAIGHT-TIME RATE, PROVIDED THAT THE HOURS DO NOT EXCEED 8 HOURS PER DAY OR 40 HOURS PER WEEK.
- AV DOUBLE TIME SHALL BE PAID FOR NEW YEAR'S DAY, EASTER SUNDAY, LABOR DAY, THANKSGIVING DAY, AND CHRISTMAS.
- AW TRADESMEN SHALL ONLY BE USED IF THE FIRST WORKER ON THE JOB IS A LANDSCAPE/IRRIGATION FITTER, SECOND WORKER MUST BE A LANDSCAPE/IRRIGATION FITTER OR APPRENTICE LANDSCAPE/IRRIGATION FITTER. THE 3RD AND 4TH MAY BE A TRADESMAN. THE 5TH MUST BE A LANDSCAPE/IRRIGATION FITTER AND THEREAFTER TRADESMEN WILL BE REFERRED ON A 50-50 BASIS, TO JOURNEYMAN OR APPRENTICE.
- AX INCLUDES AN AMOUNT FOR SUPPLEMENTAL PENSION FUND.
- AY INCLUDES AMOUNT FOR WORK ASSESSMENT DUES THAT IS NOT FACTORED INTO OVERTIME. IN ADDITION, INCLUDES AN AMOUNT FOR VACATION/HOLIDAY THAT IS NOT FACTORED INTO OVERTIME.
- AZ AMOUNT FOR VACATION/HOLIDAY IS NOT FACTORED IN OVERTIME. VACATION MAY BE INCLUDED IN THE BASIC HOURLY RATE.
- BA RATE APPLIES TO ALL HOURS WORKED ON SATURDAY AND SUNDAY, HOWEVER, IF THE EMPLOYEE DID NOT COMPLETE FORTY (40) HOURS MONDAY THROUGH FRIDAY UP TO EIGHT (8) HOURS CAN BE WORKED AT THE STRAIGHT-TIME HOURLY RATE ON SATURDAY.
- BB INCLUDES AN AMOUNT FOR THE SHEET METAL OCCUPATIONAL HEALTH INSTITUTE TRUST.
- BC INCLUDES AMOUNT FOR 401(A) PLAN. PURSUANT TO LABOR CODE SECTIONS 1773.1 AND 1773.8, THE AMOUNT PAID FOR THIS EMPLOYER PAYMENT MAY VARY RESULTING IN A LOWER TAXABLE BASIC HOURLY WAGE RATE, BUT THE TOTAL HOURLY RATES FOR STRAIGHT TIME AND OVERTIME MAY NOT BE LESS THAN THE GENERAL PREVAILING RATE OF PER DIEM WAGES.
- BD INCLUDES AN AMOUNT FOR INTERNATIONAL TRAINING INSTITUTE.
- BE INCLUDES AMOUNTS FOR NATIONAL ENERGY MANAGEMENT INSTITUTE (NEMI) FUND, SHEET METAL WORKERS' INTERNATIONAL SCHOLARSHIP FUND (SMWSF) AND INDUSTRY FUND.
- BF ONE TECHNICIAN MAY BE EMPLOYED ON EACH JOB SITE. IN ADDITION, ONE (1) TECHNICIAN MAY BE EMPLOYED FOR EACH THREE (3) BUILDING TRADES JOURNEYMAN, OR PORTION THEREOF, EMPLOYED ON THE SITE.
- BG THE EMPLOYER MAY EMPLOY ONE UTILITY WORKER, PLUS ONE FOR EACH FIVE(5) BUILDING JOURNEYMAN OR PORTION THEREOF.
- BH PURSUANT TO LABOR CODE SECTIONS 1773.1 AND 1773.8, THE AMOUNT PAID FOR THIS EMPLOYER PAYMENT MAY VARY RESULTING IN A LOWER TAXABLE BASIC HOURLY WAGE RATE, BUT THE TOTAL HOURLY RATES FOR STRAIGHT TIME AND OVERTIME MAY NOT BE LESS THAN THE GENERAL PREVAILING RATE OF PER DIEM WAGES.
- BI INCLUDED IN STRAIGHT-TIME HOURLY RATE.
- BJ RATE APPLIES TO THE FIRST 8 HOURS WORKED ON A SIXTH OR SEVENTH CONSECUTIVE DAY DURING ANY ONE CALENDAR WEEK UP TO 50 HOURS IN ANY ONE CALENDAR WEEK. ALL OTHER TIME IS PAID AT THE HOLIDAY RATE.

RECOGNIZED HOLIDAYS: HOLIDAYS UPON WHICH THE GENERAL PREVAILING HOURLY WAGE RATE FOR HOLIDAY WORK SHALL BE PAID, SHALL BE ALL HOLIDAYS IN THE COLLECTIVE BARGAINING AGREEMENT, APPLICABLE TO THE PARTICULAR CRAFT, CLASSIFICATION, OR TYPE OF WORKER EMPLOYED ON THE PROJECT, WHICH IS ON FILE WITH THE DIRECTOR OF INDUSTRIAL RELATIONS. IF THE PREVAILING RATE IS NOT BASED ON A COLLECTIVELY BARGAINED RATE, THE HOLIDAYS UPON WHICH THE PREVAILING RATE SHALL BE PAID SHALL BE AS PROVIDED IN SECTION 6700 OF THE GOVERNMENT CODE. YOU MAY OBTAIN THE HOLIDAY PROVISIONS FOR THE CURRENT DETERMINATIONS ON THE INTERNET AT [HTTP://WWW.DIR.CA.GOV/OPRL/DPreWageDetermination.htm](http://www.dir.ca.gov/OPRL/DPreWageDetermination.htm). HOLIDAY PROVISIONS FOR THE CURRENT OR SUPERSEDED DETERMINATIONS MAY BE OBTAINED BY CONTACTING THE OFFICE OF THE DIRECTOR - RESEARCH UNIT AT (415) 703-4774.

TRAVEL AND/OR SUBSISTENCE: IN ACCORDANCE WITH LABOR CODE SECTIONS 1773.1 AND 1773.9, CONTRACTORS SHALL MAKE TRAVEL AND/OR SUBSISTENCE PAYMENTS TO EACH WORKER TO EXECUTE THE WORK. YOU MAY OBTAIN THE TRAVEL AND/OR SUBSISTENCE PROVISIONS FOR THE CURRENT DETERMINATIONS ON THE INTERNET AT [HTTP://WWW.DIR.CA.GOV/OPRL/DPreWageDetermination.htm](http://www.dir.ca.gov/OPRL/DPreWageDetermination.htm). TRAVEL AND/OR SUBSISTENCE REQUIREMENTS FOR CURRENT OR SUPERSEDED DETERMINATIONS MAY BE OBTAINED BY CONTACTING THE OFFICE OF THE DIRECTOR - RESEARCH UNIT AT (415) 703-4774.

[Return to main page](#)



[Home](#) / [Workforce Safety Standards for Battery Energy Storage Systems](#)

Workforce Safety Standards for Battery Energy Storage Systems



This is a notification that BESS Workforce Safety Standards item will not be heard at the May 19, 2026 Board of Supervisors meeting. A new date is being determined and we will update you as soon as possible.

The County is committed to making sure workers who handle Battery Energy Storage Systems (BESS) and Energy Storage Management Systems (ESMS) located in the unincorporated county are safe. Earlier this year, [the Board asked](#) County staff to report on options for setting minimum safety standards for workers involved in BESS and ESMS projects.



Staff will explore options to:

- Establish minimum workforce safety standards for all stages of the BESS lifecycle.
- Require a certified electrician perform all electrical work as listed below related to a BESS facility or an ESMS:
 - Installation
 - Assembly
 - Testing
 - Commissioning

- Maintenance
 - Repair
 - Retrofitting
 - Decommissioning
- Require that a minimum percentage of the certified electricians performing the work listed above onsite obtain Energy Storage and Microgrid Training and Certification (ESAMTAC).

Your input is critical to this process. Your feedback will inform the development of the report and presented to the Board on May 5, 2026 for their consideration.

How You Can Participate:

- Review the information on this site and share it with others
- Provide comments on this site or via email to Fire@sdcounty.ca.gov([External link](#))
- Join our upcoming webinar - details below
- Ask questions

[Submit a Comment](#)

[Ask a Question](#)

Closed: Register for a Webinar

Comment Form

We want to know what you think about the Minimum Workforce Safety Standards to BESS and ESMS within the unincorporated County.

Please share your comments in the form below by **April 15, 2026**.

Your feedback will be provided to the Board for their consideration prior to adoption of these standards.

All fields marked with an asterisk (*) are required

1. Name

Maximum 255 characters

0/255

2. Last Name

Maximum 255 characters

0/255

3. Organization (if applicable)

Maximum 255 characters

0/255

4. Email

5. Supervisorial District (find your district [here](#)). *

1

2

3

4

5

I don't live or work in San Diego county.

6. Zip Code *

7. Which of the following best describes you? Select all that apply. *

I live in the County

I own a business in the County

I work in the County

I construct BESS and ESMS facilities

Prefer not to say

Other (please specify)

8. Share your comment below. *

Maximum 20,000 characters

0/20,000

Submit

protected by reCAPTCHA
reCAPTCHA is changing its terms of
service. Take action

Page last updated: 13 May 2026, 10:18 AM

Who's Listening

County Fire


Project Lead


Email Fire@sdcounty.ca.gov







Key Dates

 Board Hearing
February 10 2026

 Virtual Meeting 5:30 PM
March 25 2026

 Board Meeting 9 AM
May 05 2026

More Information

-  Why is the County exploring these options?
-  What will the Board be reviewing?
-  When will the County present its findings?
-  Who should participate?

 [What is the unincorporated county?](#)


Important Links

 [BESS Zoning Ordinance Update](#)

 [BESS Guidelines for Facilities](#)

 [BESS Best Practices Study Webinar](#)

Documents

 [Board Meeting Minute Order 2-10-26 \(175 KB\) \(pdf\)](#)

Related projects

Archived Projects

 [Battery Energy Storage Systems \(BESS\) Best Practices Report](#)



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LOCAL 221

Service Employees International Union, CLC

June 1, 2026

San Diego County Board of Supervisors

1600 Pacific Highway
San Diego, CA 92101

Re: Tier D Study

Dear Chair Lawson-Remer and Members of the Board of Supervisors,

On behalf of SEIU Local 221 and the County workers we represent, I write to express concerns regarding the impact of Tier D on the stability, recruitment and retention of county employees. Every day, staff under Tier D face pension and retirement uncertainty, making it harder to recruit and retain skilled workers our County depends on. This unfair system strains workloads, burns out dedicated employees, and weakens vital public services.

As you likely recall, during the course of our negotiations process for the 2025 to 2028 contract, County staff stated that the County was not interested in reviewing the impact of Tier D and was unwilling and/or unable to tell SEIU members the cost of eliminating Tier D. After lots of advocacy by the SEIU Bargaining Team and membership, we were very pleased that the final agreement included a commitment to work with an actuary to identify the cost of eliminating Tier D and placing all current Tier D employees and new hires on Tier C going forward. And indeed, we found the report from Foster and Foster to be very valuable in weighing the cost of implementation vs the impact to the workforce and the community.

Here are some key numbers:

- ✓ If Tier D was eliminated the cost in 2027 would be approximately \$25.4 million, 0.3% of the County's current overall annual budget
- ✓ The annual cost to the county would be approximately \$37.6 million by 2032, which would be an estimated 0.3% - 0.5% of the overall annual budget
- ✓ This cost is estimated to be between 1.0% and 2.3% of payroll costs between now and 2043

We call upon the board of supervisors to closely review this report, talk with impacted employees, and make a plan once and for all to finally end Tier D. We thank you for your engagement on this critical issue for our employees and our community.

Sincerely,

Crystal Irving

**President
SEIU Local 221**

San Diego ~ Imperial Counties

4004 Kearny Mesa Road ~ San Diego, CA 92111 ~ (858) 560-0151 ~ Fax (858) 560-1299



SPECIAL ACTUARIAL ANALYSIS
TIER D BENEFIT IMPROVEMENT

Performed For: County of San Diego
Performed By: Foster & Foster Consulting Actuaries, Inc

February 5, 2026



February 5, 2026

Joshua Ramirez
Finance & General Governmental Group
County of San Diego

Re: Tier D Benefit Analysis
San Diego County Employees Retirement Association

Dear Mr. Ramirez:

Foster & Foster Consulting Actuaries, Inc. (Foster & Foster) is pleased to present this report surrounding potential benefit changes to current Tier D employees and future new hires covered by the San Diego County Employees Retirement Association (SDCERA) to the County of San Diego (County). The findings, conclusions, and any recommendations for consideration presented in this report may be specific to the County. Foster & Foster may produce different findings or arrive at different conclusions in other situations or even in cases involving similar retirement systems. As such, it is important to keep in mind that the use of this information for purposes other than those expressed here may not be appropriate.

Foster & Foster does not provide legal, investment or accounting advice. Thus, the information in this report is not intended to supersede or supplant the advice or the interpretations of the County or its affiliated legal, investing or accounting partners.

The undersigned is familiar with the relevant aspects of retirement benefit valuations and meets the Qualification Standards of the American Academy of Actuaries.

Hopefully the results of this study will lead to good discussions. If you have any questions, concerns, or would like to discuss the results in greater detail, please do not hesitate to contact me.

Respectfully submitted,

Foster & Foster Consulting Actuaries, Inc.


By: 
Drew D. Ballard, FSA, EA, MAAA

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INTRODUCTION

SDCERA is an employer-sponsored defined benefit plan qualified under Internal Revenue Code Section 401(a) that provides a lifetime benefit to Members that is calculated based on a formula using age at retirement, years of service credit, and monthly final average compensation. SDCERA was established by the County on July 1, 1939, pursuant to California's Employees Retirement Law of 1937 (CERL). The plan currently provides benefits to nine (9) different membership tiers with varying benefit levels.

The County has requested Foster & Foster perform a special actuarial analysis to evaluate the expected impact of eliminating Tier D benefits and placing all current Tier D employees and future new hires into the Tier C benefit structure. Foster & Foster performed a parallel replication of the June 30, 2024 actuarial valuation performed by SDCERA's actuary which serves as the basis for the results presented herein.

The purpose of this report is to analyze the expected impact on the Employer and Employee cost including breakout by employee group (General/Safety) and bargaining unit (when applicable).

This analysis is only an estimate as of a single date and cannot guarantee future outcomes. Future actuarial measurements may differ significantly from the current measurements presented in this report for a variety of reasons including: changes in applicable laws, changes in plan provisions, changes in assumptions, or plan experience different from expectations. Due to the limited scope of the analysis, we did not perform an analysis of the potential range of such future measurements.



SDCERA BENEFITS (TIER C/D)

Membership Eligibility – All permanent employees of the County of San Diego or contracting district, scheduled to work 20 or more hours weekly, are eligible, subject to classification below

General Tier C	All General members with membership dates on or after January 1, 2013 and before July 1, 2018
General Tier D	All General members with membership dates on or after July 1, 2018
Safety Tier C	All Safety members with membership dates on or after January 1, 2013 and before July 1, 2020
Safety Tier D	All Safety members with membership dates on or after July 1, 2020

Final Compensation for Benefit Determination (FAC)

Tier C (General/Safety)	Highest consecutive 36 months (FAC3)
Tier D (General/Safety)	Highest consecutive 36 months (FAC3)

Service Retirement Eligibility

General Tier C and Tier D	Age 52 with 5 years of service, or age 70 regardless of service
Safety Tier C and Tier D	Age 50 with 5 years of service, or age 70 regardless of service

Benefit Formula

General Tier C	<p>Age 67 and over: 2.50% x FAC3 x Service (Reduced prior to age 67):</p> <p>Age 65: 2.30%</p> <p>Age 62: 2.00%</p> <p>Age 60: 1.80%</p> <p>Age 55: 1.30%</p> <p>Age 52: 1.00%</p> <p>Maximum Benefit: None</p>
General Tier D	<p>Age 65 and over: 1.62% x FAC3 x Service (Reduced prior to age 65):</p> <p>Age 62: 1.39%</p> <p>Age 60: 1.28%</p> <p>Age 55: 0.99%</p> <p>Age 52: 0.87%</p> <p>Maximum Benefit: 100% of FAC3</p>
Safety Tier C	<p>Age 57 and over: 2.70% x FAC3 x Service (Reduced prior to age 57):</p> <p>Age 56: 2.60%</p> <p>Age 55: 2.50%</p> <p>Age 50: 2.00%</p> <p>Maximum Benefit: None</p>
Safety Tier D	<p>Age 57 and over: 2.50% x FAC3 x Service (Reduced prior to age 57):</p> <p>Age 56: 2.429%</p> <p>Age 55: 2.357%</p> <p>Age 50: 2.000%</p> <p>Maximum Benefit: None</p>



SDCERA BENEFITS (TIER C/D)

Cost of Living Adjustment (COLA)

General Tier C and Tier D	Future changes based on changes to the CPI for the San Diego-Carlsbad Area to a maximum of 2% per year, excess “banked”
Safety Tier C and Tier D	Future changes based on changes to the CPI for the San Diego-Carlsbad Area to a maximum of 2% per year, excess “banked”

Member Contribution Rates

General Tier C	Non-entry age based rates that provide for 50% of total Normal Cost Rate Rate as of June 30, 2024: 10.00%
General Tier D	Non-entry age based rates that provide for 50% of total Normal Cost Rate Rate as of June 30, 2024: 7.35%
Safety Tier C	Non-entry age based rates that provide for 50% of total Normal Cost Rate Rate as of June 30, 2024: 16.27%
Safety Tier D	Non-entry age based rates that provide for 50% of total Normal Cost Rate Rate as of June 30, 2024: 15.69%



DEFINITIONS

An actuarial valuation provides a best estimate of a system's actuarial liabilities and contribution levels at a particular point in time. This estimate helps ensure the current assets and future contribution requirements will be sufficient to provide benefits promised to members. Future liabilities are determined by applying a set of actuarial assumptions to project the occurrence, amount and timing of benefits that will become payable according to the current plan provisions. The extent to which an actuarial valuation accurately measures a plan's liabilities and contribution levels depends on how well the actuarial assumptions predict future plan experience.

SDCERA has an annual actuarial valuation performed by its actuary based on a valuation date of June 30 each year which determines the funded status as of the valuation date and establishes the funding requirements for the fiscal year beginning twelve months after the valuation date. Foster & Foster most recently performed an independent replication of the SDCERA actuarial valuation as of June 30, 2024, which will serve as the basis for the remainder of this analysis. Below we have included of some basic pension terms:

- ❖ **Actuarial Cost Method** – A procedure for allocating the actuarial present value of benefits to time periods, usually in the form of a normal cost and an actuarially accrued liability. Under the entry age actuarial cost method (used in SDCERA's valuation), the normal cost is the sum of the individual normal costs for all active participants. For an active participant, the normal cost is determined by allocating the actuarial present value of benefits as a level percentage of compensation between the entry age and assumed exit age(s).
- ❖ **Present Value of Future Benefits (PVB)** – This is today's value of all the expected benefit payments that will be made to the current pension population. It is the discounted value of benefits that are expected to be paid in the future, determined as of a given date (i.e. valuation date) by the application of a particular set of assumptions with regard to future events. The present value of benefits under SDCERA includes the liabilities for active members, inactive members in payment status, and inactive members entitled to either a refund or a future retirement benefit.
- ❖ **Actuarial Accrued Liability (AAL)** – The portion of the actuarial present value of benefits that has been accumulated through service worked with the County.
- ❖ **Recommended Employer Contribution** – A target or recommended contribution by the actuary for the applicable plan year. This is typically comprised of the employer normal cost (and expenses, if applicable) plus a UAAL amortization payment, adjusted for interest according to the timing of contributions during the applicable plan year.
- ❖ **Normal Cost** – The portion of the actuarial present value of benefits which is earned each year. This represents the current year's costs for pension benefits.
- ❖ **Unfunded Actuarial Accrued Liability (UAAL)** – The portion of the actuarial accrued liability that is not covered by system assets.



ACTUARIAL ASSUMPTIONS/METHODS

The actuarial valuation process, while sophisticated in its calculation methodology, is an estimate of the financial value of benefits payable on contingent events, most of which occur many years into the future. Actuarial liabilities are determined by projecting future benefit payments for each member based on individual census data, the benefit provisions, and a set of actuarial assumptions regarding future compensation increases and demographic behavior (turnover, retirement, mortality, etc.).

When reviewing the results presented throughout the remainder of this report, please keep in mind the following:

- ❖ Results were based upon census data as of the June 30, 2024 actuarial valuation as provided by SDCERA which we reviewed for reasonableness but did not audit.
- ❖ We relied upon actuarial assumptions, methods, and plan provisions set forth in the June 30, 2024 actuarial valuation report prepared by SDCERA's actuary, unless otherwise noted
- ❖ The benefit change was assumed to be effective on the valuation date (June 30, 2024) for illustrative purposes
- ❖ The benefit change was assumed to be prospective, meaning there is no change to Tier D service and benefits earned on or before June 30, 2024
- ❖ Tier D participants subject to same actuarial assumptions as current Tier C participants after the valuation date
- ❖ Consistent with the approach used by SDCERA's actuary, in preparing the Normal Cost rates, we have assumed that exactly 50% of the Normal Cost would be paid by the Tier C and Tier D members



MEMBER CONTRIBUTION RATES

Pursuant to Section 7522.30(a) of the Government Code, Tier C and Tier D members are required to contribute at least 50% of the Normal Cost rate. As presented above, below is a table summarizing the member contribution rates effective June 30, 2024.

Membership Tier	Contribution Rate
General Tier C	10.00%
General Tier D	7.35%
Safety Tier C	16.27%
Safety Tier D	15.69%

If Tier D were eliminated and all current Tier D members were reclassified as Tier C members, the Tier C Normal Cost rate would need to be recalculated to take into account the change in demographic composition.

Based on our analysis, we have estimated the member contribution rates for each membership tier would change as follows:

Membership Tier	New Contribution Rate	Change
General Tier C	10.11%	+0.11%
General Tier D	10.11%	+2.76%
Safety Tier C	16.84%	+0.57%
Safety Tier D	16.84%	+1.15%



EMPLOYER COST PROJECTIONS – GENERAL/SAFETY

General										
Valuation Date	Normal Cost \$			Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll			Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits	Change in NC			Current Benefits	Proposed Benefits	Change in NC		
	\$	\$								
6/30/2024	174,100	189,600	\$ 15,500	\$ 2,300	\$ 17,800	11.7%	12.8%	1.1%	0.2%	1.3%
6/30/2025	174,600	192,100	17,500	2,400	19,900	11.4%	12.6%	1.2%	0.2%	1.4%
6/30/2026	175,300	194,800	19,500	2,400	21,900	11.2%	12.4%	1.2%	0.2%	1.4%
6/30/2027	176,100	197,600	21,500	2,500	24,000	10.9%	12.2%	1.3%	0.2%	1.5%
6/30/2028	177,100	200,600	23,500	2,600	26,100	10.6%	12.0%	1.4%	0.2%	1.6%
6/30/2029	178,100	203,600	25,500	2,700	28,200	10.4%	11.9%	1.5%	0.2%	1.7%
6/30/2030	179,100	206,700	27,600	2,700	30,300	10.2%	11.7%	1.5%	0.2%	1.7%
6/30/2031	180,200	209,900	29,700	2,800	32,500	9.9%	11.6%	1.7%	0.2%	1.9%
6/30/2032	181,100	213,100	32,000	2,900	34,900	9.7%	11.4%	1.7%	0.2%	1.9%
6/30/2033	182,200	216,400	34,200	3,000	37,200	9.5%	11.3%	1.8%	0.2%	2.0%
6/30/2034	183,300	219,900	36,600	3,100	39,700	9.3%	11.1%	1.8%	0.2%	2.0%
6/30/2035	184,600	223,500	38,900	3,200	42,100	9.1%	11.0%	1.9%	0.2%	2.1%
6/30/2036	186,000	227,300	41,300	3,300	44,600	8.9%	10.9%	2.0%	0.2%	2.2%
6/30/2037	187,500	231,300	43,800	3,400	47,200	8.7%	10.8%	2.1%	0.2%	2.3%
6/30/2038	189,100	235,500	46,400	3,500	49,900	8.5%	10.6%	2.1%	0.2%	2.3%
6/30/2039	191,100	240,000	48,900	3,600	52,500	8.4%	10.5%	2.1%	0.2%	2.3%
6/30/2040	193,500	245,100	51,600	3,700	55,300	8.3%	10.5%	2.2%	0.2%	2.4%
6/30/2041	196,400	250,600	54,200	3,800	58,000	8.1%	10.4%	2.3%	0.2%	2.5%
6/30/2042	199,800	256,500	56,700	3,900	60,600	8.1%	10.3%	2.2%	0.2%	2.4%
6/30/2043	203,600	263,000	59,400	4,000	63,400	8.0%	10.3%	2.3%	0.2%	2.5%



EMPLOYER COST PROJECTIONS – GENERAL/SAFETY

Safety										
Valuation Date	Normal Cost \$			Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll			Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits	Change in NC			Current Benefits	Proposed Benefits	Change in NC		
6/30/2024	\$ 79,500	\$ 80,300	\$ 800	\$ 0	\$ 800	21.0%	21.2%	0.2%	0.0%	0.2%
6/30/2025	80,200	81,200	1,000	0	1,000	20.6%	20.8%	0.2%	0.0%	0.2%
6/30/2026	81,000	82,300	1,300	0	1,300	20.2%	20.5%	0.3%	0.0%	0.3%
6/30/2027	81,900	83,400	1,500	0	1,500	19.8%	20.2%	0.4%	0.0%	0.4%
6/30/2028	82,800	84,500	1,700	0	1,700	19.4%	19.8%	0.4%	0.0%	0.4%
6/30/2029	83,600	85,500	1,900	0	1,900	19.1%	19.5%	0.4%	0.0%	0.4%
6/30/2030	84,400	86,600	2,200	0	2,200	18.7%	19.2%	0.5%	0.0%	0.5%
6/30/2031	85,400	87,800	2,400	0	2,400	18.4%	18.9%	0.5%	0.0%	0.5%
6/30/2032	86,400	89,100	2,700	0	2,700	18.0%	18.6%	0.6%	0.0%	0.6%
6/30/2033	87,500	90,500	3,000	0	3,000	17.7%	18.3%	0.6%	0.0%	0.6%
6/30/2034	88,700	92,000	3,300	0	3,300	17.5%	18.1%	0.6%	0.0%	0.6%
6/30/2035	90,100	93,600	3,500	0	3,500	17.2%	17.9%	0.7%	0.0%	0.7%
6/30/2036	91,600	95,400	3,800	0	3,800	17.0%	17.7%	0.7%	0.0%	0.7%
6/30/2037	93,100	97,200	4,100	0	4,100	16.8%	17.5%	0.7%	0.0%	0.7%
6/30/2038	94,700	99,100	4,400	0	4,400	16.6%	17.4%	0.8%	0.0%	0.8%
6/30/2039	96,600	101,300	4,700	0	4,700	16.4%	17.2%	0.8%	0.0%	0.8%
6/30/2040	98,700	103,700	5,000	0	5,000	16.3%	17.1%	0.8%	0.0%	0.8%
6/30/2041	101,100	106,400	5,300	0	5,300	16.2%	17.1%	0.9%	0.0%	0.9%
6/30/2042	103,700	109,400	5,700	0	5,700	16.2%	17.0%	0.8%	0.0%	0.8%
6/30/2043	106,500	112,400	5,900	0	5,900	16.1%	17.0%	0.9%	0.0%	0.9%



EMPLOYER COST PROJECTIONS – GENERAL/SAFETY

Total										
Valuation Date	Normal Cost \$			Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll			Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits	Change in NC			Current Benefits	Proposed Benefits	Change in NC		
	\$	\$								
6/30/2024	253,600	269,900	\$ 16,300	\$ 2,300	\$ 18,600	13.6%	14.5%	0.9%	0.1%	1.0%
6/30/2025	254,800	273,300	18,500	2,300	20,800	13.3%	14.3%	1.0%	0.1%	1.1%
6/30/2026	256,300	277,000	20,700	2,400	23,100	13.0%	14.0%	1.0%	0.1%	1.1%
6/30/2027	258,000	280,900	22,900	2,500	25,400	12.7%	13.8%	1.1%	0.1%	1.2%
6/30/2028	259,900	285,000	25,100	2,600	27,700	12.4%	13.6%	1.2%	0.1%	1.3%
6/30/2029	261,700	289,100	27,400	2,600	30,000	12.2%	13.4%	1.2%	0.1%	1.3%
6/30/2030	263,600	293,300	29,700	2,700	32,400	11.9%	13.2%	1.3%	0.1%	1.4%
6/30/2031	265,500	297,700	32,200	2,800	35,000	11.7%	13.1%	1.4%	0.1%	1.5%
6/30/2032	267,500	302,200	34,700	2,900	37,600	11.4%	12.9%	1.5%	0.1%	1.6%
6/30/2033	269,700	306,900	37,200	3,000	40,200	11.2%	12.7%	1.5%	0.1%	1.6%
6/30/2034	272,100	311,900	39,800	3,100	42,900	11.0%	12.6%	1.6%	0.1%	1.7%
6/30/2035	274,700	317,200	42,500	3,200	45,700	10.8%	12.4%	1.6%	0.1%	1.7%
6/30/2036	277,500	322,700	45,200	3,200	48,400	10.6%	12.3%	1.7%	0.1%	1.8%
6/30/2037	280,600	328,500	47,900	3,300	51,200	10.4%	12.1%	1.7%	0.1%	1.8%
6/30/2038	283,800	334,600	50,800	3,400	54,200	10.2%	12.0%	1.8%	0.1%	1.9%
6/30/2039	287,600	341,300	53,700	3,600	57,300	10.0%	11.9%	1.9%	0.1%	2.0%
6/30/2040	292,200	348,800	56,600	3,700	60,300	9.9%	11.8%	1.9%	0.1%	2.0%
6/30/2041	297,600	357,000	59,400	3,800	63,200	9.8%	11.8%	2.0%	0.1%	2.1%
6/30/2042	303,500	365,900	62,400	3,900	66,300	9.7%	11.7%	2.0%	0.1%	2.1%
6/30/2043	310,100	375,400	65,300	4,000	69,300	9.6%	11.7%	2.1%	0.1%	2.2%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

AE								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 4,600	\$ 5,100	\$ 100	\$ 600	12.8%	14.2%	0.2%	1.6%
6/30/2025	4,600	5,200	100	700	12.5%	14.1%	0.2%	1.8%
6/30/2026	4,600	5,300	100	800	12.3%	13.9%	0.2%	1.8%
6/30/2027	4,700	5,400	100	800	12.0%	13.8%	0.2%	2.0%
6/30/2028	4,700	5,500	100	900	11.8%	13.7%	0.2%	2.1%
6/30/2029	4,800	5,600	100	900	11.6%	13.6%	0.2%	2.2%
6/30/2030	4,800	5,700	100	1,000	11.4%	13.5%	0.2%	2.3%
6/30/2031	4,900	5,900	100	1,100	11.2%	13.4%	0.2%	2.4%
6/30/2032	5,000	6,000	100	1,100	11.0%	13.3%	0.2%	2.5%
6/30/2033	5,000	6,100	100	1,200	10.8%	13.3%	0.2%	2.7%
6/30/2034	5,100	6,300	100	1,300	10.7%	13.2%	0.2%	2.7%
6/30/2035	5,200	6,500	100	1,400	10.5%	13.1%	0.2%	2.8%
6/30/2036	5,200	6,600	100	1,500	10.4%	13.1%	0.2%	2.9%
6/30/2037	5,300	6,800	100	1,600	10.2%	13.0%	0.2%	3.0%
6/30/2038	5,400	7,000	100	1,700	10.1%	12.9%	0.2%	3.0%
6/30/2039	5,500	7,100	100	1,700	10.0%	12.9%	0.2%	3.1%
6/30/2040	5,600	7,300	100	1,800	9.9%	12.9%	0.2%	3.2%
6/30/2041	5,800	7,500	100	1,800	9.8%	12.8%	0.2%	3.2%
6/30/2042	5,900	7,700	100	1,900	9.7%	12.8%	0.2%	3.3%
6/30/2043	6,000	8,000	100	2,100	9.7%	12.8%	0.2%	3.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

AM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 159	\$ 159	\$ 0	\$ -	19.0%	19.0%	0.0%	-
6/30/2025	157	158	0	1	18.3%	18.5%	0.0%	0.2%
6/30/2026	153	157	0	4	17.7%	18.1%	0.0%	0.4%
6/30/2027	143	150	0	7	16.5%	17.3%	0.0%	0.8%
6/30/2028	129	139	0	10	15.1%	16.3%	0.0%	1.2%
6/30/2029	112	126	0	14	13.5%	15.2%	0.0%	1.7%
6/30/2030	100	117	0	17	12.2%	14.3%	0.0%	2.1%
6/30/2031	91	111	0	20	11.2%	13.6%	0.0%	2.4%
6/30/2032	86	107	0	21	10.4%	13.0%	0.0%	2.6%
6/30/2033	82	105	0	23	9.9%	12.7%	0.0%	2.8%
6/30/2034	80	104	0	24	9.5%	12.4%	0.0%	2.9%
6/30/2035	79	105	0	26	9.2%	12.2%	0.0%	3.0%
6/30/2036	79	106	0	27	9.0%	12.0%	0.0%	3.0%
6/30/2037	80	108	0	28	8.9%	12.0%	0.0%	3.1%
6/30/2038	81	110	0	29	8.8%	11.9%	0.0%	3.1%
6/30/2039	83	113	0	30	8.7%	11.9%	0.0%	3.2%
6/30/2040	85	116	0	31	8.7%	11.8%	0.0%	3.1%
6/30/2041	87	119	0	32	8.7%	11.8%	0.0%	3.1%
6/30/2042	90	122	0	32	8.6%	11.8%	0.0%	3.2%
6/30/2043	92	126	0	34	8.6%	11.8%	0.0%	3.2%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

AS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 314	\$ 319	\$ 1	\$ 6	15.7%	16.0%	0.0%	0.3%
6/30/2025	310	317	1	8	15.1%	15.4%	0.0%	0.3%
6/30/2026	306	315	1	10	14.5%	14.9%	0.1%	0.5%
6/30/2027	297	309	1	13	13.7%	14.3%	0.1%	0.7%
6/30/2028	288	303	1	16	13.0%	13.7%	0.1%	0.8%
6/30/2029	272	290	1	19	12.0%	12.9%	0.1%	1.0%
6/30/2030	258	280	1	23	11.2%	12.2%	0.1%	1.1%
6/30/2031	247	272	1	26	10.5%	11.6%	0.1%	1.2%
6/30/2032	231	259	1	29	9.7%	10.9%	0.1%	1.3%
6/30/2033	215	247	1	33	8.9%	10.2%	0.1%	1.4%
6/30/2034	204	239	1	36	8.3%	9.7%	0.1%	1.5%
6/30/2035	193	231	1	39	7.7%	9.2%	0.1%	1.6%
6/30/2036	185	226	1	42	7.3%	8.9%	0.1%	1.7%
6/30/2037	179	222	1	44	6.9%	8.5%	0.1%	1.7%
6/30/2038	176	221	2	47	6.6%	8.3%	0.1%	1.8%
6/30/2039	174	222	2	50	6.3%	8.1%	0.1%	1.9%
6/30/2040	174	224	2	52	6.2%	7.9%	0.1%	1.8%
6/30/2041	175	227	2	54	6.1%	7.8%	0.1%	1.8%
6/30/2042	178	231	2	55	6.0%	7.8%	0.1%	1.9%
6/30/2043	181	236	2	57	5.9%	7.7%	0.1%	1.9%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CC								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 73	\$ 81	\$ 0	\$ 8	8.0%	8.9%	0.0%	0.9%
6/30/2025	74	82	0	8	7.9%	8.8%	0.0%	0.9%
6/30/2026	74	83	0	9	7.7%	8.6%	0.0%	0.9%
6/30/2027	75	84	0	9	7.5%	8.5%	0.0%	1.0%
6/30/2028	74	84	0	10	7.3%	8.3%	0.0%	1.0%
6/30/2029	74	85	1	12	7.1%	8.1%	0.0%	1.0%
6/30/2030	74	85	1	12	6.9%	8.0%	0.0%	1.1%
6/30/2031	74	85	1	12	6.7%	7.8%	0.0%	1.1%
6/30/2032	73	85	1	13	6.5%	7.6%	0.0%	1.1%
6/30/2033	68	81	1	14	6.0%	7.1%	0.0%	1.1%
6/30/2034	65	79	1	15	5.6%	6.8%	0.1%	1.3%
6/30/2035	63	77	1	15	5.3%	6.6%	0.1%	1.4%
6/30/2036	62	77	1	16	5.2%	6.4%	0.1%	1.3%
6/30/2037	62	78	1	17	5.0%	6.3%	0.1%	1.4%
6/30/2038	62	78	1	17	4.9%	6.2%	0.1%	1.4%
6/30/2039	63	79	1	17	4.8%	6.1%	0.1%	1.4%
6/30/2040	63	81	1	19	4.7%	6.0%	0.1%	1.4%
6/30/2041	64	82	1	19	4.7%	6.0%	0.1%	1.4%
6/30/2042	66	84	1	19	4.6%	5.9%	0.1%	1.4%
6/30/2043	67	86	1	20	4.6%	5.9%	0.1%	1.4%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CE								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 4,600	\$ 5,000	\$ 100	\$ 500	11.5%	12.6%	0.2%	1.3%
6/30/2025	4,600	5,100	100	600	11.2%	12.3%	0.2%	1.3%
6/30/2026	4,700	5,200	100	600	10.9%	12.1%	0.2%	1.4%
6/30/2027	4,700	5,200	100	600	10.7%	11.9%	0.2%	1.4%
6/30/2028	4,700	5,300	100	700	10.4%	11.7%	0.2%	1.5%
6/30/2029	4,700	5,400	100	800	10.2%	11.6%	0.2%	1.6%
6/30/2030	4,800	5,500	100	800	9.9%	11.4%	0.2%	1.7%
6/30/2031	4,800	5,600	100	900	9.7%	11.3%	0.2%	1.8%
6/30/2032	4,800	5,600	100	900	9.5%	11.1%	0.2%	1.8%
6/30/2033	4,900	5,700	100	900	9.3%	11.0%	0.2%	1.9%
6/30/2034	4,900	5,800	100	1,000	9.1%	10.8%	0.2%	1.9%
6/30/2035	5,000	5,900	100	1,000	8.9%	10.7%	0.2%	2.0%
6/30/2036	5,000	6,000	100	1,100	8.7%	10.5%	0.2%	2.0%
6/30/2037	5,000	6,100	100	1,200	8.5%	10.4%	0.2%	2.1%
6/30/2038	5,100	6,200	100	1,200	8.4%	10.3%	0.2%	2.1%
6/30/2039	5,100	6,400	100	1,400	8.2%	10.2%	0.2%	2.2%
6/30/2040	5,200	6,500	100	1,400	8.1%	10.1%	0.2%	2.2%
6/30/2041	5,300	6,600	100	1,400	8.0%	10.0%	0.2%	2.2%
6/30/2042	5,400	6,800	100	1,500	7.9%	9.9%	0.2%	2.2%
6/30/2043	5,500	7,000	100	1,600	7.8%	9.9%	0.2%	2.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CEM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 10,200	\$ 10,900	\$ 100	\$ 800	12.2%	13.0%	0.1%	0.9%
6/30/2025	10,300	11,100	100	900	11.9%	12.8%	0.1%	1.0%
6/30/2026	10,400	11,300	100	1,000	11.7%	12.7%	0.1%	1.1%
6/30/2027	10,500	11,600	100	1,200	11.5%	12.6%	0.1%	1.2%
6/30/2028	10,600	11,800	100	1,300	11.3%	12.4%	0.1%	1.2%
6/30/2029	10,800	12,000	100	1,300	11.0%	12.3%	0.1%	1.4%
6/30/2030	10,900	12,300	100	1,500	10.8%	12.2%	0.1%	1.5%
6/30/2031	11,000	12,500	100	1,600	10.6%	12.1%	0.1%	1.6%
6/30/2032	11,100	12,700	100	1,700	10.4%	12.0%	0.1%	1.7%
6/30/2033	11,200	13,000	100	1,900	10.2%	11.8%	0.1%	1.7%
6/30/2034	11,300	13,200	100	2,000	10.0%	11.7%	0.1%	1.8%
6/30/2035	11,400	13,500	100	2,200	9.8%	11.6%	0.1%	1.9%
6/30/2036	11,500	13,800	200	2,500	9.6%	11.5%	0.1%	2.0%
6/30/2037	11,600	14,100	200	2,700	9.4%	11.4%	0.1%	2.1%
6/30/2038	11,800	14,400	200	2,800	9.3%	11.3%	0.1%	2.1%
6/30/2039	11,900	14,700	200	3,000	9.1%	11.2%	0.1%	2.2%
6/30/2040	12,100	15,000	200	3,100	9.0%	11.1%	0.1%	2.2%
6/30/2041	12,300	15,400	200	3,300	8.9%	11.1%	0.1%	2.3%
6/30/2042	12,500	15,800	200	3,500	8.8%	11.0%	0.1%	2.3%
6/30/2043	12,800	16,200	200	3,600	8.7%	11.0%	0.1%	2.4%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CL								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 12,600	\$ 14,600	\$ 200	\$ 2,200	11.6%	13.4%	0.2%	2.0%
6/30/2025	12,600	14,800	200	2,400	11.3%	13.3%	0.2%	2.2%
6/30/2026	12,700	15,100	200	2,600	11.0%	13.1%	0.2%	2.3%
6/30/2027	12,800	15,400	200	2,800	10.8%	13.0%	0.2%	2.4%
6/30/2028	12,900	15,700	200	3,000	10.6%	12.9%	0.2%	2.5%
6/30/2029	13,100	16,100	200	3,200	10.4%	12.8%	0.2%	2.6%
6/30/2030	13,300	16,400	200	3,300	10.3%	12.7%	0.2%	2.6%
6/30/2031	13,500	16,800	200	3,500	10.1%	12.6%	0.2%	2.7%
6/30/2032	13,700	17,200	200	3,700	10.0%	12.5%	0.2%	2.7%
6/30/2033	13,900	17,600	300	4,000	9.8%	12.5%	0.2%	2.9%
6/30/2034	14,200	18,100	300	4,200	9.7%	12.4%	0.2%	2.9%
6/30/2035	14,400	18,500	300	4,400	9.6%	12.4%	0.2%	3.0%
6/30/2036	14,700	19,000	300	4,600	9.5%	12.3%	0.2%	3.0%
6/30/2037	15,000	19,500	300	4,800	9.4%	12.3%	0.2%	3.1%
6/30/2038	15,300	20,000	300	5,000	9.3%	12.2%	0.2%	3.1%
6/30/2039	15,600	20,600	300	5,300	9.3%	12.2%	0.2%	3.1%
6/30/2040	16,000	21,100	300	5,400	9.2%	12.1%	0.2%	3.1%
6/30/2041	16,400	21,700	300	5,600	9.1%	12.1%	0.2%	3.2%
6/30/2042	16,800	22,300	300	5,800	9.1%	12.1%	0.2%	3.2%
6/30/2043	17,200	23,000	300	6,100	9.0%	12.1%	0.2%	3.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 2,600	\$ 3,000	\$ 0	\$ 400	11.9%	13.5%	0.2%	1.8%
6/30/2025	2,600	3,000	0	400	11.6%	13.3%	0.2%	1.9%
6/30/2026	2,600	3,100	0	500	11.4%	13.2%	0.2%	2.0%
6/30/2027	2,700	3,100	0	400	11.1%	13.1%	0.2%	2.2%
6/30/2028	2,700	3,200	0	500	11.0%	13.0%	0.2%	2.2%
6/30/2029	2,700	3,300	0	600	10.8%	12.9%	0.2%	2.3%
6/30/2030	2,800	3,300	0	500	10.6%	12.8%	0.2%	2.4%
6/30/2031	2,800	3,400	0	600	10.4%	12.7%	0.2%	2.5%
6/30/2032	2,800	3,500	100	800	10.2%	12.6%	0.2%	2.6%
6/30/2033	2,900	3,600	100	800	10.1%	12.5%	0.2%	2.6%
6/30/2034	2,900	3,700	100	900	9.9%	12.4%	0.2%	2.7%
6/30/2035	3,000	3,700	100	800	9.8%	12.3%	0.2%	2.7%
6/30/2036	3,000	3,800	100	900	9.6%	12.3%	0.2%	2.9%
6/30/2037	3,100	3,900	100	900	9.5%	12.2%	0.2%	2.9%
6/30/2038	3,100	4,000	100	1,000	9.4%	12.1%	0.2%	2.9%
6/30/2039	3,200	4,100	100	1,000	9.3%	12.1%	0.2%	3.0%
6/30/2040	3,200	4,200	100	1,100	9.2%	12.0%	0.2%	3.0%
6/30/2041	3,300	4,300	100	1,100	9.1%	12.0%	0.2%	3.1%
6/30/2042	3,300	4,400	100	1,200	9.0%	11.9%	0.2%	3.1%
6/30/2043	3,400	4,600	100	1,300	8.9%	11.9%	0.2%	3.2%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CR								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 2,500	\$ 2,900	\$ 0	\$ 400	12.5%	14.5%	0.2%	2.2%
6/30/2025	2,500	2,900	0	400	12.3%	14.4%	0.2%	2.3%
6/30/2026	2,500	3,000	0	500	12.2%	14.4%	0.2%	2.4%
6/30/2027	2,600	3,100	0	500	12.0%	14.3%	0.2%	2.5%
6/30/2028	2,600	3,200	0	600	11.8%	14.2%	0.2%	2.6%
6/30/2029	2,700	3,200	0	500	11.6%	14.2%	0.2%	2.8%
6/30/2030	2,700	3,300	0	600	11.5%	14.1%	0.2%	2.8%
6/30/2031	2,800	3,400	100	700	11.3%	14.1%	0.2%	3.0%
6/30/2032	2,800	3,500	100	800	11.2%	14.1%	0.2%	3.1%
6/30/2033	2,900	3,600	100	800	11.1%	14.0%	0.2%	3.1%
6/30/2034	2,900	3,700	100	900	11.0%	14.0%	0.2%	3.2%
6/30/2035	3,000	3,800	100	900	10.9%	14.0%	0.2%	3.3%
6/30/2036	3,100	3,900	100	900	10.8%	13.9%	0.2%	3.3%
6/30/2037	3,100	4,000	100	1,000	10.8%	13.9%	0.2%	3.3%
6/30/2038	3,200	4,200	100	1,100	10.7%	13.9%	0.2%	3.4%
6/30/2039	3,300	4,300	100	1,100	10.6%	13.9%	0.2%	3.5%
6/30/2040	3,300	4,400	100	1,200	10.6%	13.9%	0.2%	3.5%
6/30/2041	3,400	4,500	100	1,200	10.5%	13.9%	0.2%	3.6%
6/30/2042	3,500	4,700	100	1,300	10.4%	13.9%	0.2%	3.7%
6/30/2043	3,600	4,800	100	1,300	10.4%	13.9%	0.2%	3.7%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

CS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,400	\$ 1,500	\$ 0	\$ 100	9.4%	10.2%	0.2%	1.0%
6/30/2025	1,400	1,600	0	200	9.3%	10.1%	0.2%	1.0%
6/30/2026	1,500	1,600	0	100	9.1%	10.0%	0.2%	1.1%
6/30/2027	1,500	1,600	0	100	9.0%	9.9%	0.2%	1.1%
6/30/2028	1,500	1,700	0	200	8.9%	9.9%	0.2%	1.2%
6/30/2029	1,500	1,700	0	200	8.7%	9.8%	0.2%	1.3%
6/30/2030	1,500	1,700	0	200	8.6%	9.7%	0.2%	1.3%
6/30/2031	1,500	1,700	0	200	8.5%	9.6%	0.2%	1.3%
6/30/2032	1,600	1,800	0	200	8.3%	9.5%	0.2%	1.4%
6/30/2033	1,600	1,800	0	200	8.2%	9.4%	0.2%	1.4%
6/30/2034	1,600	1,800	0	200	8.0%	9.3%	0.2%	1.5%
6/30/2035	1,600	1,800	0	200	7.8%	9.1%	0.2%	1.5%
6/30/2036	1,600	1,900	0	300	7.7%	9.0%	0.2%	1.5%
6/30/2037	1,600	1,900	0	300	7.5%	8.9%	0.2%	1.6%
6/30/2038	1,600	1,900	0	300	7.3%	8.8%	0.2%	1.7%
6/30/2039	1,600	1,900	0	300	7.2%	8.7%	0.2%	1.7%
6/30/2040	1,600	1,900	0	300	7.1%	8.6%	0.2%	1.7%
6/30/2041	1,600	2,000	0	400	7.0%	8.6%	0.2%	1.8%
6/30/2042	1,600	2,000	0	400	6.9%	8.5%	0.2%	1.8%
6/30/2043	1,700	2,100	100	500	6.8%	8.5%	0.2%	1.9%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

DA								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 6,800	\$ 7,000	\$ 100	\$ 300	11.6%	11.9%	0.1%	0.4%
6/30/2025	6,800	6,900	100	200	11.2%	11.5%	0.1%	0.4%
6/30/2026	6,700	6,900	100	300	10.8%	11.2%	0.1%	0.5%
6/30/2027	6,600	6,800	100	300	10.4%	10.8%	0.1%	0.5%
6/30/2028	6,500	6,700	100	300	10.0%	10.4%	0.1%	0.5%
6/30/2029	6,300	6,600	100	400	9.6%	10.1%	0.1%	0.6%
6/30/2030	6,200	6,500	100	400	9.2%	9.7%	0.1%	0.6%
6/30/2031	6,000	6,400	100	500	8.8%	9.3%	0.1%	0.6%
6/30/2032	5,900	6,300	100	500	8.4%	8.9%	0.1%	0.6%
6/30/2033	5,700	6,200	100	600	8.0%	8.6%	0.1%	0.7%
6/30/2034	5,600	6,100	100	600	7.6%	8.3%	0.1%	0.8%
6/30/2035	5,400	5,900	100	600	7.3%	7.9%	0.1%	0.7%
6/30/2036	5,300	5,800	100	600	6.9%	7.6%	0.1%	0.8%
6/30/2037	5,100	5,700	100	700	6.5%	7.3%	0.1%	0.9%
6/30/2038	4,900	5,500	100	700	6.2%	6.9%	0.1%	0.8%
6/30/2039	4,700	5,300	100	700	5.8%	6.6%	0.1%	0.9%
6/30/2040	4,500	5,200	100	800	5.5%	6.3%	0.1%	0.9%
6/30/2041	4,400	5,100	100	800	5.2%	6.1%	0.1%	1.0%
6/30/2042	4,300	5,100	100	900	5.0%	5.9%	0.1%	1.0%
6/30/2043	4,200	5,100	100	1,000	4.8%	5.7%	0.1%	1.0%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

DI								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 4,300	\$ 4,400	\$ 0	\$ 100	28.9%	29.2%	0.0%	0.3%
6/30/2025	4,400	4,500	0	100	28.4%	28.9%	0.0%	0.5%
6/30/2026	4,500	4,600	0	100	28.0%	28.6%	0.0%	0.6%
6/30/2027	4,500	4,700	0	200	27.6%	28.4%	0.0%	0.8%
6/30/2028	4,700	4,800	0	100	27.2%	28.2%	0.0%	1.0%
6/30/2029	4,800	5,000	0	200	26.9%	28.0%	0.0%	1.1%
6/30/2030	4,900	5,100	0	200	26.7%	27.9%	0.0%	1.2%
6/30/2031	5,000	5,300	0	300	26.5%	27.8%	0.0%	1.3%
6/30/2032	5,200	5,400	0	200	26.4%	27.8%	0.0%	1.4%
6/30/2033	5,300	5,600	0	300	26.2%	27.7%	0.0%	1.5%
6/30/2034	5,400	5,800	0	400	26.1%	27.7%	0.0%	1.6%
6/30/2035	5,600	5,900	0	300	26.1%	27.7%	0.0%	1.6%
6/30/2036	5,700	6,100	0	400	26.0%	27.7%	0.0%	1.7%
6/30/2037	5,900	6,300	0	400	25.9%	27.7%	0.0%	1.8%
6/30/2038	6,000	6,400	0	400	25.9%	27.7%	0.0%	1.8%
6/30/2039	6,200	6,600	0	400	25.9%	27.7%	0.0%	1.8%
6/30/2040	6,300	6,800	0	500	25.8%	27.7%	0.0%	1.9%
6/30/2041	6,500	7,000	0	500	25.8%	27.8%	0.0%	2.0%
6/30/2042	6,700	7,200	0	500	25.8%	27.8%	0.0%	2.0%
6/30/2043	6,900	7,400	0	500	25.8%	27.8%	0.0%	2.0%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

DM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,500	\$ 1,500	\$ 0	\$ -	32.8%	32.8%	0.0%	-
6/30/2025	1,500	1,500	0	-	30.8%	31.1%	0.0%	0.3%
6/30/2026	1,400	1,400	0	-	29.2%	29.6%	0.0%	0.4%
6/30/2027	1,400	1,400	0	-	27.6%	28.2%	0.0%	0.6%
6/30/2028	1,400	1,400	0	-	26.3%	27.1%	0.0%	0.8%
6/30/2029	1,300	1,400	0	100	25.3%	26.1%	0.0%	0.8%
6/30/2030	1,300	1,400	0	100	24.3%	25.2%	0.0%	0.9%
6/30/2031	1,300	1,400	0	100	23.6%	24.6%	0.0%	1.0%
6/30/2032	1,300	1,400	0	100	23.0%	24.1%	0.0%	1.1%
6/30/2033	1,300	1,400	0	100	22.5%	23.6%	0.0%	1.1%
6/30/2034	1,300	1,400	0	100	22.0%	23.2%	0.0%	1.2%
6/30/2035	1,400	1,400	0	-	21.7%	22.9%	0.0%	1.2%
6/30/2036	1,400	1,500	0	100	21.4%	22.7%	0.0%	1.3%
6/30/2037	1,400	1,500	0	100	21.2%	22.5%	0.0%	1.3%
6/30/2038	1,400	1,500	0	100	21.0%	22.3%	0.0%	1.3%
6/30/2039	1,500	1,500	0	-	20.9%	22.2%	0.0%	1.3%
6/30/2040	1,500	1,600	0	100	20.8%	22.1%	0.0%	1.3%
6/30/2041	1,500	1,600	0	100	20.7%	22.1%	0.0%	1.4%
6/30/2042	1,600	1,700	0	100	20.6%	22.0%	0.0%	1.4%
6/30/2043	1,600	1,700	0	100	20.6%	22.0%	0.0%	1.4%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

DS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 56,500	\$ 57,000	\$ 0	\$ 500	20.0%	20.2%	0.0%	0.2%
6/30/2025	57,200	57,900	0	700	19.7%	19.9%	0.0%	0.2%
6/30/2026	58,000	58,800	0	800	19.4%	19.6%	0.0%	0.2%
6/30/2027	58,800	59,700	0	900	19.1%	19.4%	0.0%	0.3%
6/30/2028	59,600	60,700	0	1,100	18.8%	19.1%	0.0%	0.3%
6/30/2029	60,300	61,500	0	1,200	18.4%	18.8%	0.0%	0.4%
6/30/2030	61,000	62,400	0	1,400	18.1%	18.5%	0.0%	0.4%
6/30/2031	61,700	63,300	0	1,600	17.8%	18.2%	0.0%	0.4%
6/30/2032	62,600	64,300	0	1,700	17.5%	18.0%	0.0%	0.5%
6/30/2033	63,400	65,300	0	1,900	17.2%	17.7%	0.0%	0.5%
6/30/2034	64,300	66,400	0	2,100	16.9%	17.5%	0.0%	0.6%
6/30/2035	65,300	67,600	0	2,300	16.7%	17.3%	0.0%	0.6%
6/30/2036	66,300	68,800	0	2,500	16.5%	17.1%	0.0%	0.6%
6/30/2037	67,400	70,100	0	2,700	16.3%	16.9%	0.0%	0.6%
6/30/2038	68,500	71,400	0	2,900	16.0%	16.7%	0.0%	0.7%
6/30/2039	69,800	72,900	0	3,100	15.9%	16.6%	0.0%	0.7%
6/30/2040	71,300	74,600	0	3,300	15.7%	16.5%	0.0%	0.8%
6/30/2041	73,000	76,600	0	3,600	15.7%	16.4%	0.0%	0.7%
6/30/2042	74,800	78,700	0	3,900	15.6%	16.4%	0.0%	0.8%
6/30/2043	76,800	80,900	0	4,100	15.5%	16.4%	0.0%	0.9%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

EM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 5,600	\$ 5,700	\$ 0	\$ 100	15.6%	15.9%	0.1%	0.4%
6/30/2025	5,600	5,700	0	100	15.2%	15.6%	0.1%	0.5%
6/30/2026	5,500	5,700	0	200	14.7%	15.3%	0.1%	0.7%
6/30/2027	5,500	5,700	0	200	14.3%	15.0%	0.1%	0.8%
6/30/2028	5,400	5,700	0	300	13.9%	14.7%	0.1%	0.9%
6/30/2029	5,300	5,700	0	400	13.5%	14.4%	0.1%	1.0%
6/30/2030	5,200	5,600	0	400	13.0%	14.1%	0.1%	1.2%
6/30/2031	5,100	5,600	0	500	12.6%	13.8%	0.1%	1.3%
6/30/2032	5,000	5,500	0	500	12.2%	13.4%	0.1%	1.3%
6/30/2033	4,900	5,500	0	600	11.7%	13.1%	0.1%	1.5%
6/30/2034	4,800	5,400	0	600	11.3%	12.8%	0.1%	1.6%
6/30/2035	4,700	5,400	0	700	10.9%	12.6%	0.1%	1.8%
6/30/2036	4,600	5,400	0	800	10.5%	12.3%	0.1%	1.9%
6/30/2037	4,500	5,300	0	800	10.2%	12.0%	0.1%	1.9%
6/30/2038	4,400	5,300	0	900	9.8%	11.8%	0.1%	2.1%
6/30/2039	4,400	5,300	0	900	9.5%	11.6%	0.1%	2.2%
6/30/2040	4,300	5,300	0	1,000	9.3%	11.5%	0.1%	2.3%
6/30/2041	4,300	5,400	0	1,100	9.1%	11.3%	0.1%	2.3%
6/30/2042	4,300	5,400	0	1,100	8.9%	11.2%	0.1%	2.4%
6/30/2043	4,400	5,500	0	1,100	8.8%	11.1%	0.1%	2.4%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

EO								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 417	\$ 438	\$ 2	\$ 23	19.9%	20.9%	0.1%	1.1%
6/30/2025	348	375	2	29	17.6%	19.0%	0.1%	1.5%
6/30/2026	302	335	3	36	15.8%	17.5%	0.1%	1.8%
6/30/2027	249	287	3	41	13.6%	15.7%	0.1%	2.2%
6/30/2028	232	273	3	44	12.7%	15.0%	0.1%	2.4%
6/30/2029	221	265	3	47	12.0%	14.4%	0.2%	2.6%
6/30/2030	217	263	3	49	11.6%	14.1%	0.2%	2.7%
6/30/2031	217	265	3	51	11.4%	13.9%	0.2%	2.7%
6/30/2032	217	268	3	54	11.2%	13.8%	0.2%	2.8%
6/30/2033	221	274	3	56	11.1%	13.8%	0.2%	2.9%
6/30/2034	226	281	3	58	11.1%	13.7%	0.2%	2.8%
6/30/2035	232	289	3	60	11.0%	13.7%	0.2%	2.9%
6/30/2036	239	297	3	61	11.0%	13.7%	0.2%	2.9%
6/30/2037	244	304	4	64	11.0%	13.7%	0.2%	2.9%
6/30/2038	248	311	4	67	10.9%	13.7%	0.2%	3.0%
6/30/2039	254	319	4	69	10.9%	13.7%	0.2%	3.0%
6/30/2040	260	327	4	71	10.9%	13.7%	0.2%	3.0%
6/30/2041	265	335	4	74	10.8%	13.7%	0.2%	3.1%
6/30/2042	271	343	4	76	10.8%	13.7%	0.2%	3.1%
6/30/2043	276	351	4	79	10.8%	13.7%	0.2%	3.1%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

FS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,000	\$ 1,100	\$ 0	\$ 100	13.6%	15.4%	0.1%	1.9%
6/30/2025	1,000	1,200	0	200	13.2%	15.2%	0.1%	2.1%
6/30/2026	1,000	1,200	0	200	12.9%	15.1%	0.1%	2.3%
6/30/2027	1,000	1,200	0	200	12.6%	15.0%	0.1%	2.5%
6/30/2028	1,000	1,200	0	200	12.3%	14.9%	0.1%	2.7%
6/30/2029	1,000	1,300	0	300	12.1%	14.8%	0.1%	2.8%
6/30/2030	1,000	1,300	0	300	11.9%	14.7%	0.1%	2.9%
6/30/2031	1,100	1,300	0	200	11.7%	14.7%	0.1%	3.1%
6/30/2032	1,100	1,400	0	300	11.6%	14.6%	0.1%	3.1%
6/30/2033	1,100	1,400	0	300	11.4%	14.6%	0.1%	3.3%
6/30/2034	1,100	1,400	0	300	11.3%	14.6%	0.1%	3.4%
6/30/2035	1,100	1,500	0	400	11.2%	14.5%	0.1%	3.4%
6/30/2036	1,200	1,500	0	300	11.1%	14.5%	0.1%	3.5%
6/30/2037	1,200	1,600	0	400	11.0%	14.5%	0.1%	3.6%
6/30/2038	1,200	1,600	0	400	10.9%	14.5%	0.1%	3.7%
6/30/2039	1,300	1,700	0	400	10.9%	14.5%	0.1%	3.7%
6/30/2040	1,300	1,700	0	400	10.8%	14.4%	0.1%	3.7%
6/30/2041	1,300	1,800	0	500	10.8%	14.4%	0.1%	3.7%
6/30/2042	1,300	1,800	0	500	10.7%	14.4%	0.1%	3.8%
6/30/2043	1,400	1,900	0	500	10.7%	14.4%	0.1%	3.8%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

HS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 3,400	\$ 4,000	\$ 0	\$ 600	11.5%	13.7%	0.2%	2.4%
6/30/2025	3,400	4,100	0	700	11.3%	13.6%	0.2%	2.5%
6/30/2026	3,400	4,200	0	800	11.1%	13.5%	0.2%	2.6%
6/30/2027	3,500	4,300	0	800	10.9%	13.4%	0.2%	2.7%
6/30/2028	3,500	4,400	100	1,000	10.7%	13.3%	0.2%	2.8%
6/30/2029	3,600	4,500	100	1,000	10.6%	13.2%	0.2%	2.8%
6/30/2030	3,600	4,600	100	1,100	10.5%	13.2%	0.2%	2.9%
6/30/2031	3,700	4,700	100	1,100	10.3%	13.1%	0.2%	3.0%
6/30/2032	3,800	4,800	100	1,100	10.2%	13.1%	0.2%	3.1%
6/30/2033	3,800	4,900	100	1,200	10.1%	13.0%	0.2%	3.1%
6/30/2034	3,900	5,100	100	1,300	10.0%	13.0%	0.2%	3.2%
6/30/2035	4,000	5,200	100	1,300	9.9%	12.9%	0.2%	3.2%
6/30/2036	4,100	5,400	100	1,400	9.8%	12.9%	0.2%	3.3%
6/30/2037	4,200	5,500	100	1,400	9.7%	12.9%	0.2%	3.4%
6/30/2038	4,300	5,700	100	1,500	9.7%	12.8%	0.2%	3.3%
6/30/2039	4,400	5,800	100	1,500	9.6%	12.8%	0.2%	3.4%
6/30/2040	4,500	6,000	100	1,600	9.6%	12.8%	0.2%	3.4%
6/30/2041	4,600	6,200	100	1,700	9.5%	12.8%	0.2%	3.5%
6/30/2042	4,700	6,300	100	1,700	9.5%	12.8%	0.2%	3.5%
6/30/2043	4,800	6,500	100	1,800	9.4%	12.7%	0.2%	3.5%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

MA								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 20,500	\$ 21,300	\$ 100	\$ 900	13.2%	13.8%	0.1%	0.7%
6/30/2025	20,600	21,700	100	1,200	12.9%	13.6%	0.1%	0.8%
6/30/2026	20,800	22,000	100	1,300	12.6%	13.4%	0.1%	0.9%
6/30/2027	20,900	22,400	100	1,600	12.3%	13.2%	0.1%	1.0%
6/30/2028	21,100	22,800	100	1,800	12.0%	13.0%	0.1%	1.1%
6/30/2029	21,200	23,200	200	2,200	11.8%	12.9%	0.1%	1.2%
6/30/2030	21,300	23,600	200	2,500	11.5%	12.7%	0.1%	1.3%
6/30/2031	21,500	24,000	200	2,700	11.2%	12.5%	0.1%	1.4%
6/30/2032	21,600	24,300	200	2,900	10.9%	12.4%	0.1%	1.6%
6/30/2033	21,600	24,700	200	3,300	10.7%	12.2%	0.1%	1.6%
6/30/2034	21,800	25,100	200	3,500	10.4%	12.0%	0.1%	1.7%
6/30/2035	21,900	25,600	200	3,900	10.2%	11.9%	0.1%	1.8%
6/30/2036	22,000	26,000	200	4,200	9.9%	11.7%	0.1%	1.9%
6/30/2037	22,200	26,500	200	4,500	9.7%	11.6%	0.1%	2.0%
6/30/2038	22,300	27,000	200	4,900	9.5%	11.5%	0.1%	2.1%
6/30/2039	22,500	27,500	200	5,200	9.3%	11.4%	0.1%	2.2%
6/30/2040	22,700	28,100	200	5,600	9.1%	11.3%	0.1%	2.3%
6/30/2041	23,000	28,700	200	5,900	9.0%	11.2%	0.1%	2.3%
6/30/2042	23,400	29,400	200	6,200	8.8%	11.1%	0.1%	2.4%
6/30/2043	23,800	30,100	200	6,500	8.7%	11.1%	0.1%	2.5%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

MM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 12,000	\$ 12,600	\$ 100	\$ 700	13.2%	13.8%	0.1%	0.7%
6/30/2025	12,000	12,700	100	800	12.8%	13.5%	0.1%	0.8%
6/30/2026	12,000	12,800	100	900	12.4%	13.2%	0.1%	0.9%
6/30/2027	12,000	13,000	100	1,100	12.0%	13.0%	0.1%	1.1%
6/30/2028	12,000	13,100	100	1,200	11.7%	12.7%	0.1%	1.1%
6/30/2029	12,000	13,300	100	1,400	11.3%	12.5%	0.1%	1.3%
6/30/2030	12,000	13,400	100	1,500	11.0%	12.3%	0.1%	1.4%
6/30/2031	12,100	13,600	100	1,600	10.7%	12.1%	0.1%	1.5%
6/30/2032	12,100	13,800	100	1,800	10.5%	11.9%	0.1%	1.5%
6/30/2033	12,100	14,000	100	2,000	10.2%	11.7%	0.1%	1.6%
6/30/2034	12,200	14,200	100	2,100	9.9%	11.6%	0.1%	1.8%
6/30/2035	12,200	14,400	100	2,300	9.6%	11.4%	0.1%	1.9%
6/30/2036	12,300	14,700	100	2,500	9.4%	11.2%	0.1%	1.9%
6/30/2037	12,300	14,900	100	2,700	9.2%	11.1%	0.1%	2.0%
6/30/2038	12,400	15,200	200	3,000	9.0%	11.0%	0.1%	2.1%
6/30/2039	12,500	15,400	200	3,100	8.8%	10.9%	0.1%	2.2%
6/30/2040	12,700	15,800	200	3,300	8.7%	10.8%	0.1%	2.2%
6/30/2041	12,800	16,100	200	3,500	8.5%	10.7%	0.1%	2.3%
6/30/2042	13,000	16,500	200	3,700	8.4%	10.6%	0.1%	2.3%
6/30/2043	13,300	16,900	200	3,800	8.3%	10.5%	0.1%	2.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

NA								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,411	\$ 1,533	\$ 18	\$ 140	11.9%	12.9%	0.2%	1.2%
6/30/2025	1,422	1,554	19	151	11.6%	12.7%	0.2%	1.3%
6/30/2026	1,428	1,570	19	161	11.3%	12.4%	0.2%	1.3%
6/30/2027	1,434	1,586	20	172	11.0%	12.2%	0.2%	1.4%
6/30/2028	1,443	1,606	20	183	10.7%	12.0%	0.2%	1.5%
6/30/2029	1,450	1,623	21	194	10.5%	11.7%	0.2%	1.4%
6/30/2030	1,456	1,639	22	205	10.2%	11.5%	0.2%	1.5%
6/30/2031	1,458	1,654	22	218	10.0%	11.3%	0.2%	1.5%
6/30/2032	1,440	1,648	23	231	9.6%	11.0%	0.2%	1.6%
6/30/2033	1,423	1,645	24	246	9.3%	10.7%	0.2%	1.6%
6/30/2034	1,410	1,645	24	259	9.0%	10.5%	0.2%	1.7%
6/30/2035	1,393	1,643	25	275	8.7%	10.2%	0.2%	1.7%
6/30/2036	1,375	1,639	26	290	8.3%	9.9%	0.2%	1.8%
6/30/2037	1,356	1,635	26	305	8.0%	9.7%	0.2%	1.9%
6/30/2038	1,340	1,634	27	321	7.7%	9.4%	0.2%	1.9%
6/30/2039	1,327	1,636	28	337	7.5%	9.2%	0.2%	1.9%
6/30/2040	1,321	1,646	29	354	7.3%	9.1%	0.2%	2.0%
6/30/2041	1,321	1,662	30	371	7.1%	8.9%	0.2%	2.0%
6/30/2042	1,325	1,681	31	387	6.9%	8.8%	0.2%	2.1%
6/30/2043	1,336	1,708	32	404	6.8%	8.7%	0.2%	2.1%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

NE								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,500	\$ 1,500	\$ 0	\$ -	23.0%	23.3%	0.0%	0.3%
6/30/2025	1,400	1,400	0	-	21.7%	22.4%	0.0%	0.7%
6/30/2026	1,300	1,400	0	100	20.6%	21.7%	0.0%	1.1%
6/30/2027	1,300	1,300	0	-	19.8%	21.1%	0.0%	1.3%
6/30/2028	1,200	1,300	0	100	19.0%	20.6%	0.0%	1.6%
6/30/2029	1,100	1,200	0	100	18.2%	20.1%	0.0%	1.9%
6/30/2030	1,100	1,200	0	100	17.6%	19.7%	0.0%	2.1%
6/30/2031	1,100	1,200	0	100	17.1%	19.4%	0.0%	2.3%
6/30/2032	1,000	1,200	0	200	16.7%	19.1%	0.0%	2.4%
6/30/2033	1,000	1,200	0	200	16.4%	19.0%	0.0%	2.6%
6/30/2034	1,000	1,200	0	200	16.1%	18.8%	0.0%	2.7%
6/30/2035	1,100	1,200	0	100	16.0%	18.7%	0.0%	2.7%
6/30/2036	1,100	1,300	0	200	15.9%	18.6%	0.0%	2.7%
6/30/2037	1,100	1,300	0	200	15.7%	18.6%	0.0%	2.9%
6/30/2038	1,100	1,300	0	200	15.6%	18.5%	0.0%	2.9%
6/30/2039	1,100	1,300	0	200	15.5%	18.5%	0.0%	3.0%
6/30/2040	1,200	1,400	0	200	15.5%	18.4%	0.0%	2.9%
6/30/2041	1,200	1,400	0	200	15.4%	18.4%	0.0%	3.0%
6/30/2042	1,200	1,400	0	200	15.4%	18.4%	0.0%	3.0%
6/30/2043	1,200	1,500	0	300	15.4%	18.3%	0.0%	2.9%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

NM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 35	\$ 38	\$ 0	\$ 3	10.0%	10.8%	0.1%	0.9%
6/30/2025	36	39	0	3	10.0%	10.8%	0.1%	0.9%
6/30/2026	37	40	0	3	9.9%	10.8%	0.1%	1.0%
6/30/2027	38	41	0	3	9.8%	10.7%	0.1%	1.0%
6/30/2028	38	42	1	5	9.7%	10.6%	0.1%	1.0%
6/30/2029	39	43	1	5	9.6%	10.6%	0.1%	1.1%
6/30/2030	40	44	1	5	9.5%	10.4%	0.1%	1.0%
6/30/2031	40	44	1	5	9.2%	10.3%	0.1%	1.2%
6/30/2032	39	44	1	6	8.8%	9.9%	0.1%	1.2%
6/30/2033	38	44	1	7	8.4%	9.6%	0.1%	1.3%
6/30/2034	37	44	1	8	7.9%	9.3%	0.1%	1.5%
6/30/2035	37	44	1	8	7.5%	9.0%	0.1%	1.6%
6/30/2036	36	44	1	9	7.2%	8.8%	0.1%	1.7%
6/30/2037	35	44	1	10	6.9%	8.5%	0.1%	1.7%
6/30/2038	35	44	1	10	6.6%	8.3%	0.1%	1.8%
6/30/2039	35	45	1	11	6.4%	8.2%	0.1%	1.9%
6/30/2040	35	45	1	11	6.2%	8.1%	0.1%	2.0%
6/30/2041	36	46	1	11	6.1%	8.0%	0.1%	2.0%
6/30/2042	36	47	1	12	6.1%	7.9%	0.1%	1.9%
6/30/2043	37	49	1	13	6.0%	7.9%	0.1%	2.0%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

PD								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,900	\$ 2,100	\$ 100	\$ 300	6.9%	7.6%	0.2%	0.9%
6/30/2025	1,900	2,100	100	300	6.8%	7.5%	0.2%	0.9%
6/30/2026	2,000	2,200	100	300	6.6%	7.3%	0.2%	0.9%
6/30/2027	2,000	2,200	100	300	6.4%	7.2%	0.2%	1.0%
6/30/2028	2,000	2,200	100	300	6.3%	7.1%	0.2%	1.0%
6/30/2029	2,000	2,300	100	400	6.2%	7.0%	0.2%	1.0%
6/30/2030	2,100	2,300	100	300	6.1%	7.0%	0.2%	1.1%
6/30/2031	2,100	2,400	100	400	6.0%	6.9%	0.2%	1.1%
6/30/2032	2,100	2,400	100	400	6.0%	6.8%	0.2%	1.0%
6/30/2033	2,100	2,400	100	400	5.8%	6.7%	0.2%	1.1%
6/30/2034	2,100	2,500	100	500	5.7%	6.6%	0.2%	1.1%
6/30/2035	2,100	2,500	100	500	5.5%	6.4%	0.2%	1.1%
6/30/2036	2,100	2,500	100	500	5.3%	6.3%	0.2%	1.2%
6/30/2037	2,100	2,500	100	500	5.2%	6.1%	0.2%	1.1%
6/30/2038	2,100	2,500	100	500	5.1%	6.0%	0.2%	1.1%
6/30/2039	2,100	2,600	100	600	5.0%	5.9%	0.2%	1.1%
6/30/2040	2,200	2,600	100	500	4.9%	5.9%	0.2%	1.2%
6/30/2041	2,200	2,700	100	600	4.8%	5.8%	0.2%	1.2%
6/30/2042	2,200	2,700	100	600	4.7%	5.7%	0.2%	1.2%
6/30/2043	2,200	2,700	100	600	4.6%	5.7%	0.2%	1.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

PM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 2,200	\$ 2,200	\$ 0	\$ -	13.9%	13.9%	0.0%	-
6/30/2025	2,300	2,300	0	-	13.6%	13.8%	0.0%	0.2%
6/30/2026	2,300	2,300	0	-	13.3%	13.6%	0.0%	0.3%
6/30/2027	2,300	2,300	0	-	13.1%	13.4%	0.0%	0.3%
6/30/2028	2,300	2,300	0	-	12.8%	13.2%	0.0%	0.4%
6/30/2029	2,300	2,400	0	100	12.5%	13.1%	0.0%	0.6%
6/30/2030	2,200	2,400	0	200	12.2%	12.9%	0.0%	0.7%
6/30/2031	2,200	2,400	0	200	11.8%	12.6%	0.0%	0.8%
6/30/2032	2,200	2,400	0	200	11.5%	12.4%	0.0%	0.9%
6/30/2033	2,200	2,400	0	200	11.2%	12.3%	0.0%	1.1%
6/30/2034	2,200	2,400	0	200	11.0%	12.1%	0.0%	1.1%
6/30/2035	2,200	2,400	0	200	10.7%	11.9%	0.0%	1.2%
6/30/2036	2,100	2,400	0	300	10.4%	11.7%	0.0%	1.3%
6/30/2037	2,100	2,400	0	300	10.1%	11.6%	0.0%	1.5%
6/30/2038	2,100	2,400	0	300	9.8%	11.4%	0.0%	1.6%
6/30/2039	2,000	2,400	0	400	9.5%	11.2%	0.0%	1.7%
6/30/2040	2,000	2,400	0	400	9.3%	11.1%	0.0%	1.8%
6/30/2041	2,000	2,400	0	400	9.1%	11.0%	0.0%	1.9%
6/30/2042	2,000	2,500	0	500	9.0%	11.0%	0.0%	2.0%
6/30/2043	2,000	2,500	0	500	8.9%	11.0%	0.0%	2.1%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

PO								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 11,300	\$ 11,500	\$ 0	\$ 200	20.4%	20.8%	0.0%	0.4%
6/30/2025	11,400	11,600	0	200	20.1%	20.5%	0.0%	0.4%
6/30/2026	11,600	11,800	0	200	19.8%	20.2%	0.0%	0.4%
6/30/2027	11,700	12,000	0	300	19.4%	19.9%	0.0%	0.5%
6/30/2028	11,900	12,200	0	300	19.1%	19.6%	0.0%	0.5%
6/30/2029	12,000	12,400	0	400	18.8%	19.3%	0.0%	0.5%
6/30/2030	12,200	12,500	0	300	18.5%	19.0%	0.0%	0.5%
6/30/2031	12,300	12,700	0	400	18.1%	18.7%	0.0%	0.6%
6/30/2032	12,400	12,900	0	500	17.8%	18.4%	0.0%	0.6%
6/30/2033	12,600	13,100	0	500	17.5%	18.2%	0.0%	0.7%
6/30/2034	12,800	13,300	0	500	17.2%	17.9%	0.0%	0.7%
6/30/2035	13,000	13,500	0	500	17.0%	17.7%	0.0%	0.7%
6/30/2036	13,200	13,800	0	600	16.8%	17.5%	0.0%	0.7%
6/30/2037	13,400	14,100	0	700	16.6%	17.4%	0.0%	0.8%
6/30/2038	13,700	14,400	0	700	16.4%	17.2%	0.0%	0.8%
6/30/2039	14,000	14,700	0	700	16.3%	17.1%	0.0%	0.8%
6/30/2040	14,300	15,100	0	800	16.2%	17.0%	0.0%	0.8%
6/30/2041	14,700	15,500	0	800	16.1%	17.0%	0.0%	0.9%
6/30/2042	15,100	15,900	0	800	16.0%	16.9%	0.0%	0.9%
6/30/2043	15,500	16,400	0	900	16.0%	16.9%	0.0%	0.9%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

PR								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 13,700	\$ 15,500	\$ 300	\$ 2,100	10.0%	11.4%	0.2%	1.6%
6/30/2025	13,800	15,800	300	2,300	9.8%	11.2%	0.2%	1.6%
6/30/2026	13,900	16,000	300	2,400	9.6%	11.1%	0.2%	1.7%
6/30/2027	14,000	16,200	300	2,500	9.4%	10.9%	0.2%	1.7%
6/30/2028	14,100	16,500	300	2,700	9.2%	10.7%	0.2%	1.7%
6/30/2029	14,200	16,700	300	2,800	9.0%	10.6%	0.2%	1.8%
6/30/2030	14,300	17,000	300	3,000	8.8%	10.5%	0.2%	1.9%
6/30/2031	14,400	17,300	300	3,200	8.6%	10.3%	0.2%	1.9%
6/30/2032	14,500	17,600	300	3,400	8.4%	10.2%	0.2%	2.0%
6/30/2033	14,700	17,800	400	3,500	8.3%	10.0%	0.2%	1.9%
6/30/2034	14,800	18,100	400	3,700	8.1%	9.9%	0.2%	2.0%
6/30/2035	14,900	18,500	400	4,000	7.9%	9.8%	0.2%	2.1%
6/30/2036	15,100	18,800	400	4,100	7.8%	9.7%	0.2%	2.1%
6/30/2037	15,300	19,200	400	4,300	7.7%	9.6%	0.2%	2.1%
6/30/2038	15,500	19,600	400	4,500	7.5%	9.5%	0.2%	2.2%
6/30/2039	15,700	20,000	400	4,700	7.4%	9.4%	0.2%	2.2%
6/30/2040	16,000	20,400	400	4,800	7.3%	9.4%	0.2%	2.3%
6/30/2041	16,300	20,900	400	5,000	7.2%	9.3%	0.2%	2.3%
6/30/2042	16,600	21,400	500	5,300	7.2%	9.3%	0.2%	2.3%
6/30/2043	16,900	22,000	500	5,600	7.1%	9.2%	0.2%	2.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

PS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 14,600	\$ 16,200	\$ 200	\$ 1,800	11.6%	12.9%	0.2%	1.5%
6/30/2025	14,700	16,400	200	1,900	11.3%	12.7%	0.2%	1.6%
6/30/2026	14,800	16,700	200	2,100	11.1%	12.5%	0.2%	1.6%
6/30/2027	14,900	17,000	200	2,300	10.8%	12.4%	0.2%	1.8%
6/30/2028	15,000	17,300	200	2,500	10.6%	12.2%	0.2%	1.8%
6/30/2029	15,100	17,600	200	2,700	10.4%	12.1%	0.2%	1.9%
6/30/2030	15,300	17,900	200	2,800	10.2%	11.9%	0.2%	1.9%
6/30/2031	15,400	18,200	200	3,000	10.0%	11.8%	0.2%	2.0%
6/30/2032	15,500	18,600	200	3,300	9.8%	11.7%	0.2%	2.1%
6/30/2033	15,700	18,900	300	3,500	9.6%	11.5%	0.2%	2.1%
6/30/2034	15,900	19,300	300	3,700	9.4%	11.4%	0.2%	2.2%
6/30/2035	16,000	19,700	300	4,000	9.2%	11.3%	0.2%	2.3%
6/30/2036	16,200	20,100	300	4,200	9.0%	11.2%	0.2%	2.4%
6/30/2037	16,400	20,500	300	4,400	8.9%	11.1%	0.2%	2.4%
6/30/2038	16,600	20,900	300	4,600	8.7%	11.0%	0.2%	2.5%
6/30/2039	16,800	21,400	300	4,900	8.6%	10.9%	0.2%	2.5%
6/30/2040	17,100	21,900	300	5,100	8.5%	10.8%	0.2%	2.5%
6/30/2041	17,400	22,400	300	5,300	8.4%	10.8%	0.2%	2.6%
6/30/2042	17,700	23,000	300	5,600	8.3%	10.7%	0.2%	2.6%
6/30/2043	18,100	23,600	300	5,800	8.2%	10.7%	0.2%	2.7%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

RN								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 6,500	\$ 7,500	\$ 100	\$ 1,100	9.1%	10.4%	0.2%	1.5%
6/30/2025	6,600	7,600	100	1,100	8.9%	10.2%	0.2%	1.5%
6/30/2026	6,700	7,700	200	1,200	8.7%	10.1%	0.2%	1.6%
6/30/2027	6,700	7,900	200	1,400	8.5%	10.0%	0.2%	1.7%
6/30/2028	6,800	8,000	200	1,400	8.4%	9.8%	0.2%	1.6%
6/30/2029	6,900	8,100	200	1,400	8.2%	9.7%	0.2%	1.7%
6/30/2030	6,900	8,300	200	1,600	8.0%	9.6%	0.2%	1.8%
6/30/2031	7,000	8,400	200	1,600	7.8%	9.4%	0.2%	1.8%
6/30/2032	7,000	8,500	200	1,700	7.7%	9.3%	0.2%	1.8%
6/30/2033	7,100	8,700	200	1,800	7.5%	9.2%	0.2%	1.9%
6/30/2034	7,200	8,800	200	1,800	7.4%	9.1%	0.2%	1.9%
6/30/2035	7,200	9,000	200	2,000	7.3%	9.0%	0.2%	1.9%
6/30/2036	7,300	9,100	200	2,000	7.1%	8.9%	0.2%	2.0%
6/30/2037	7,400	9,300	200	2,100	7.0%	8.8%	0.2%	2.0%
6/30/2038	7,500	9,500	200	2,200	6.9%	8.7%	0.2%	2.0%
6/30/2039	7,600	9,700	200	2,300	6.8%	8.7%	0.2%	2.1%
6/30/2040	7,700	9,900	200	2,400	6.7%	8.6%	0.2%	2.1%
6/30/2041	7,900	10,200	200	2,500	6.6%	8.5%	0.2%	2.1%
6/30/2042	8,000	10,400	200	2,600	6.6%	8.5%	0.2%	2.1%
6/30/2043	8,200	10,700	300	2,800	6.5%	8.5%	0.2%	2.2%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

SM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 1,800	\$ 1,800	\$ 0	\$ -	26.5%	26.5%	0.0%	-
6/30/2025	1,700	1,700	0	-	25.2%	25.3%	0.0%	0.1%
6/30/2026	1,700	1,700	0	-	24.0%	24.2%	0.0%	0.2%
6/30/2027	1,600	1,600	0	-	22.9%	23.2%	0.0%	0.3%
6/30/2028	1,500	1,600	0	100	21.6%	22.0%	0.0%	0.4%
6/30/2029	1,500	1,500	0	-	20.5%	21.0%	0.0%	0.5%
6/30/2030	1,400	1,500	0	100	19.5%	20.1%	0.0%	0.6%
6/30/2031	1,400	1,400	0	-	18.6%	19.3%	0.0%	0.7%
6/30/2032	1,300	1,400	0	100	17.7%	18.5%	0.0%	0.8%
6/30/2033	1,300	1,400	0	100	17.0%	17.9%	0.0%	0.9%
6/30/2034	1,300	1,400	0	100	16.5%	17.4%	0.0%	0.9%
6/30/2035	1,300	1,400	0	100	16.1%	17.0%	0.0%	0.9%
6/30/2036	1,300	1,400	0	100	15.8%	16.7%	0.0%	0.9%
6/30/2037	1,300	1,400	0	100	15.5%	16.5%	0.0%	1.0%
6/30/2038	1,300	1,400	0	100	15.3%	16.3%	0.0%	1.0%
6/30/2039	1,300	1,400	0	100	15.2%	16.2%	0.0%	1.0%
6/30/2040	1,400	1,400	0	-	15.1%	16.1%	0.0%	1.0%
6/30/2041	1,400	1,500	0	100	15.0%	16.0%	0.0%	1.0%
6/30/2042	1,400	1,500	0	100	15.0%	16.0%	0.0%	1.0%
6/30/2043	1,500	1,600	0	100	15.0%	16.0%	0.0%	1.0%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

SO								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 2,600	\$ 2,600	\$ 0	\$ -	25.9%	25.9%	0.0%	-
6/30/2025	2,600	2,600	0	-	24.9%	25.0%	0.0%	0.1%
6/30/2026	2,500	2,600	0	100	23.9%	24.1%	0.0%	0.2%
6/30/2027	2,500	2,500	0	-	22.9%	23.2%	0.0%	0.3%
6/30/2028	2,500	2,500	0	-	22.1%	22.5%	0.0%	0.4%
6/30/2029	2,500	2,500	0	-	21.3%	21.7%	0.0%	0.4%
6/30/2030	2,500	2,500	0	-	20.4%	21.0%	0.0%	0.6%
6/30/2031	2,400	2,500	0	100	19.7%	20.3%	0.0%	0.6%
6/30/2032	2,400	2,500	0	100	19.0%	19.7%	0.0%	0.7%
6/30/2033	2,400	2,500	0	100	18.4%	19.1%	0.0%	0.7%
6/30/2034	2,400	2,500	0	100	17.9%	18.7%	0.0%	0.8%
6/30/2035	2,400	2,500	0	100	17.4%	18.2%	0.0%	0.8%
6/30/2036	2,400	2,600	0	200	17.0%	17.9%	0.0%	0.9%
6/30/2037	2,500	2,600	0	100	16.7%	17.6%	0.0%	0.9%
6/30/2038	2,500	2,600	0	100	16.4%	17.4%	0.0%	1.0%
6/30/2039	2,500	2,700	0	200	16.2%	17.2%	0.0%	1.0%
6/30/2040	2,600	2,800	0	200	16.1%	17.1%	0.0%	1.0%
6/30/2041	2,700	2,800	0	100	16.0%	17.0%	0.0%	1.0%
6/30/2042	2,700	2,900	0	200	15.9%	17.0%	0.0%	1.1%
6/30/2043	2,800	3,000	0	200	15.9%	16.9%	0.0%	1.0%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

SS								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 4,800	\$ 4,900	\$ 100	\$ 200	12.4%	12.8%	0.1%	0.5%
6/30/2025	4,800	5,000	100	300	12.1%	12.5%	0.1%	0.5%
6/30/2026	4,800	5,000	100	300	11.7%	12.3%	0.1%	0.7%
6/30/2027	4,800	5,100	100	400	11.4%	12.0%	0.1%	0.7%
6/30/2028	4,900	5,100	100	300	11.1%	11.8%	0.1%	0.8%
6/30/2029	4,900	5,200	100	400	10.8%	11.6%	0.1%	0.9%
6/30/2030	4,900	5,300	100	500	10.5%	11.4%	0.1%	1.0%
6/30/2031	4,800	5,300	100	600	10.2%	11.1%	0.1%	1.0%
6/30/2032	4,800	5,300	100	600	9.8%	10.9%	0.1%	1.2%
6/30/2033	4,800	5,400	100	700	9.5%	10.6%	0.1%	1.2%
6/30/2034	4,800	5,400	100	700	9.3%	10.4%	0.1%	1.2%
6/30/2035	4,800	5,500	100	800	9.0%	10.2%	0.1%	1.3%
6/30/2036	4,800	5,500	100	800	8.7%	10.0%	0.1%	1.4%
6/30/2037	4,800	5,600	100	900	8.5%	9.9%	0.1%	1.5%
6/30/2038	4,800	5,700	100	1,000	8.2%	9.7%	0.1%	1.6%
6/30/2039	4,800	5,800	100	1,100	8.0%	9.5%	0.1%	1.6%
6/30/2040	4,900	5,900	100	1,100	7.8%	9.4%	0.1%	1.7%
6/30/2041	4,900	6,000	100	1,200	7.7%	9.3%	0.1%	1.7%
6/30/2042	5,000	6,100	100	1,200	7.6%	9.3%	0.1%	1.8%
6/30/2043	5,100	6,200	100	1,200	7.5%	9.2%	0.1%	1.8%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

SW								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 21,500	\$ 24,300	\$ 400	\$ 3,200	10.6%	12.0%	0.2%	1.6%
6/30/2025	21,700	24,700	400	3,400	10.4%	11.8%	0.2%	1.6%
6/30/2026	21,900	25,200	400	3,700	10.2%	11.7%	0.2%	1.7%
6/30/2027	22,200	25,600	400	3,800	10.0%	11.6%	0.2%	1.8%
6/30/2028	22,400	26,100	400	4,100	9.8%	11.5%	0.2%	1.9%
6/30/2029	22,700	26,700	400	4,400	9.7%	11.3%	0.2%	1.8%
6/30/2030	23,000	27,200	500	4,700	9.5%	11.2%	0.2%	1.9%
6/30/2031	23,300	27,700	500	4,900	9.3%	11.1%	0.2%	2.0%
6/30/2032	23,600	28,300	500	5,200	9.2%	11.0%	0.2%	2.0%
6/30/2033	23,800	28,800	500	5,500	9.0%	10.9%	0.2%	2.1%
6/30/2034	24,100	29,400	500	5,800	8.9%	10.8%	0.2%	2.1%
6/30/2035	24,500	30,000	500	6,000	8.7%	10.7%	0.2%	2.2%
6/30/2036	24,800	30,700	500	6,400	8.6%	10.6%	0.2%	2.2%
6/30/2037	25,100	31,300	600	6,800	8.4%	10.5%	0.2%	2.3%
6/30/2038	25,500	32,000	600	7,100	8.3%	10.4%	0.2%	2.3%
6/30/2039	25,800	32,700	600	7,500	8.2%	10.4%	0.2%	2.4%
6/30/2040	26,300	33,500	600	7,800	8.1%	10.3%	0.2%	2.4%
6/30/2041	26,700	34,300	600	8,200	8.0%	10.2%	0.2%	2.4%
6/30/2042	27,300	35,200	600	8,500	7.9%	10.2%	0.2%	2.5%
6/30/2043	27,800	36,200	700	9,100	7.8%	10.2%	0.2%	2.6%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

UM								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 6,000	\$ 6,300	\$ 0	\$ 300	13.2%	13.9%	0.1%	0.8%
6/30/2025	6,000	6,300	0	300	12.8%	13.6%	0.1%	0.9%
6/30/2026	6,000	6,400	0	400	12.5%	13.4%	0.1%	1.0%
6/30/2027	6,000	6,500	0	500	12.1%	13.1%	0.1%	1.1%
6/30/2028	6,000	6,600	0	600	11.8%	12.9%	0.1%	1.2%
6/30/2029	6,000	6,600	0	600	11.4%	12.6%	0.1%	1.3%
6/30/2030	6,000	6,700	100	800	11.1%	12.4%	0.1%	1.4%
6/30/2031	6,000	6,800	100	900	10.8%	12.2%	0.1%	1.5%
6/30/2032	6,000	6,800	100	900	10.5%	11.9%	0.1%	1.5%
6/30/2033	6,000	6,900	100	1,000	10.1%	11.7%	0.1%	1.7%
6/30/2034	6,000	7,000	100	1,100	9.8%	11.4%	0.1%	1.7%
6/30/2035	6,000	7,000	100	1,100	9.5%	11.2%	0.1%	1.8%
6/30/2036	6,000	7,100	100	1,200	9.3%	11.1%	0.1%	1.9%
6/30/2037	6,000	7,200	100	1,300	9.0%	10.9%	0.1%	2.0%
6/30/2038	6,000	7,300	100	1,400	8.8%	10.7%	0.1%	2.0%
6/30/2039	6,000	7,400	100	1,500	8.6%	10.6%	0.1%	2.1%
6/30/2040	6,000	7,500	100	1,600	8.4%	10.5%	0.1%	2.2%
6/30/2041	6,100	7,600	100	1,600	8.2%	10.4%	0.1%	2.3%
6/30/2042	6,100	7,800	100	1,800	8.1%	10.3%	0.1%	2.3%
6/30/2043	6,200	7,900	100	1,800	8.0%	10.2%	0.1%	2.3%



EMPLOYER COST PROJECTIONS – BARGAINING UNIT

Non-County								
Valuation Date	Normal Cost \$		Additional UAAL Payment \$	Change \$	Normal Cost % of Payroll		Additional UAAL Payment % of Payroll	Change % of Payroll
	Current Benefits	Proposed Benefits			Current Benefits	Proposed Benefits		
6/30/2024	\$ 12,500	\$ 13,400	\$ 200	\$ 1,100	13.1%	13.9%	0.2%	1.0%
6/30/2025	12,400	13,400	200	1,200	12.6%	13.5%	0.2%	1.1%
6/30/2026	12,300	13,500	200	1,400	12.1%	13.2%	0.2%	1.3%
6/30/2027	12,300	13,500	200	1,400	11.7%	12.9%	0.2%	1.4%
6/30/2028	12,200	13,700	200	1,700	11.3%	12.7%	0.2%	1.6%
6/30/2029	12,200	13,800	200	1,800	11.0%	12.4%	0.2%	1.6%
6/30/2030	12,200	13,900	200	1,900	10.7%	12.2%	0.2%	1.7%
6/30/2031	12,200	14,100	200	2,100	10.4%	12.0%	0.2%	1.8%
6/30/2032	12,200	14,200	200	2,200	10.0%	11.7%	0.2%	1.9%
6/30/2033	12,200	14,400	200	2,400	9.8%	11.6%	0.2%	2.0%
6/30/2034	12,200	14,600	200	2,600	9.5%	11.4%	0.2%	2.1%
6/30/2035	12,200	14,800	200	2,800	9.3%	11.2%	0.2%	2.1%
6/30/2036	12,300	15,000	300	3,000	9.0%	11.0%	0.2%	2.2%
6/30/2037	12,300	15,200	300	3,200	8.8%	10.9%	0.2%	2.3%
6/30/2038	12,400	15,400	300	3,300	8.6%	10.7%	0.2%	2.3%
6/30/2039	12,500	15,700	300	3,500	8.4%	10.6%	0.2%	2.4%
6/30/2040	12,600	16,000	300	3,700	8.3%	10.5%	0.2%	2.4%
6/30/2041	12,800	16,300	300	3,800	8.1%	10.4%	0.2%	2.5%
6/30/2042	13,000	16,700	300	4,000	8.0%	10.3%	0.2%	2.5%
6/30/2043	13,200	17,100	300	4,200	7.9%	10.3%	0.2%	2.6%





Consulado General del Perú

Los Ángeles

Apr 30, 2026

Honorable Board of Supervisors, San Diego County
Clerk of the Board

The Consulate General of Peru in Los Angeles, with jurisdiction over Southern California and the State of Arizona, presents its compliments to the Honorable Authorities of San Diego County and has the honor to inform you that the second round of Presidential Elections of the Republic of Peru will be held on Sunday, June 7, 2026.

In accordance with the Constitution of the Republic of Peru, national elections are conducted every five years for the purpose of electing a President, Vice Presidents, and Members of Congress. As part of this constitutional mandate, Peruvian consular offices abroad are required to organize and administer the electoral process within their respective jurisdictions, thereby ensuring that Peruvian citizens residing overseas are afforded an appropriate venue to exercise their civic and political rights.

In fulfillment of our constitutional mandate, the Consulate has designated a centralized voting center for Peruvian citizens residing in San Diego County and the surrounding areas at the following location:

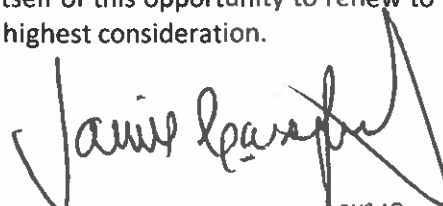
San Diego Miramar College
10440 Black Mountain Rd., San Diego, CA 92126
7:00 a.m. to 5:00 p.m.

The Consulate General of Peru considers it a matter of protocol to inform the Authorities of San Diego County of this significant civic gathering. While the Consulate will manage the event's internal requirements without requesting operational aid, we provide this notice to ensure the County is duly informed of the projected presence of Peruvian nationals on the date specified.

The aforementioned information has also been communicated to the Los Angeles Office of Foreign Missions.

The Consulate General of Peru in Los Angeles avails itself of this opportunity to renew to the Honorable Authorities of San Diego County the assurances of its highest consideration.




JAIME RAFAEL CASAFRANCA AGUILAR
CÓNSUL GENERAL DEL PERÚ
LOS ANGELES, CA



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
1600 PACIFIC HIGHWAY, ROOM 402, SAN DIEGO, CALIFORNIA 92101-2422
(619) 531-5600

RYAN SHARP
ASSISTANT CLERK

ANN MOORE
ASSISTANT CLERK

May 12, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

Attached, for your information, is correspondence from Joseph Dougherty, Assistant Superintendent of the Encinitas Union School District, regarding the Adoption of increased Development Fees on Residential and Commercial Development.

Respectfully,


ANDREW POTTER

Attachment

cc: Ebony N. Shelton, Chief Administrative Officer
Dahvia Lynch, Deputy Chief Administrative Officer, Land Use & Environment Group
Board of Supervisors Communications Received

AJP: jse

April 16, 2026

COSD CLERK OF THE BOARD
2026 MAY 8 PM1:02

Board of Trustees

Emily Andrade
Monica Lee
Tom Morton
Marla Strich
Marlon Taylor

Clerk of the County Board of Supervisors
County of San Diego
1600 Pacific Highway
San Diego, CA 92101

Superintendent

Andrée Grey, Ed.D.

Re: Transmittal of Encinitas Union School District Resolution No. 16-2526
Adoption of Increase of Development Fees on Residential and Commercial Development

Dear Sir/Madam,

**Assistant
Superintendents**

Amy Illingworth, Ed.D.
Educational Services

Angelica Lopez, Ed.D.
Administrative Services

Joseph Dougherty
Business Services

On April 14, the governing board of the Encinitas Union School District ("District") adopted Resolution No. 16-2526 approving a Fee Justification Study ("Fee Study") and the levy of statutory school fees on new residential, commercial, and industrial development in accordance with Government Code Section 65995 ("SB 50"). Enclosed please find a copy of the above-referenced resolution, the Fee Study, and a map (please refer to page 18 of the Fee Study) clearly indicating the boundaries of the area subject to the school facility fees.

The Encinitas Union School District is one of five feeder-school districts to the San Dieguito Union High School District. The fee allocation schedule for splitting the developer fee sets the Encinitas Union School District prorated developer fee at \$2.55/sq. ft. for residential construction and \$0.41/sq. ft. for commercial/industrial construction and is effective on June 16, 2026.

This letter also serves as notification that the appropriate school facility fees must be paid to the District prior to the issuance of any building permit for residential or commercial/industrial development and that the collection of school facility fees is not subject to Government Code Section 66007(a).

As you are aware, pursuant to the provisions of Education Code Section 17620, the County/City may not issue a building permit for any construction within the district's boundaries unless and until the District has executed a certificate of compliance indicating that the developer has paid the required school fees. We appreciate your prompt attention to this matter. If you have any questions, please contact Joseph Dougherty at 760-944-4300 ext. 1161 or by email at joseph.dougherty@eusd.net.

Sincerely,



Joseph Dougherty
Assistant Superintendent
Business Services

JD/ja

Board of Trustees

Emily Andrade
Monica Lee
Tom Morton
Maria Strich
Marlon Taylor

DEVELOPER/SCHOOL FEE COLLECTION/PAYMENT POLICY

Developer receives fee certification from City.

Superintendent

Andrée Grey, Ed.D.

Developer Should:

- a. Call EUSD to make an appointment to pay the fees and get the form signed off. 760-944-4300 Ext 1166
- b. Appointments are available daily between **8:30 am** and **3:30 pm** excluding weekends and holidays. Please be sure to call for an appointment prior to coming in the office.
- c. Payment methods accepted are **check** or **cash only**.

Assistant Superintendents

Amy Illingworth, Ed.D.
Educational Services

Angelica Lopez, Ed.D.
Administrative Services

Joseph Dougherty
Business Services

Square Footage, on which fees are calculated, are determined by the City and are listed on the Fee Certification document. Current fees are as follows:

As of July 1, 2026

\$2.55 Per Square Foot Residential Development

\$0.41 Per Square Foot Commercial Development

Fees are subject to change

We are located at the intersection of Encinitas Blvd, Ranch Santa Fe Rd. and Manchester:

101 S.Rancho Santa Fe Road
Suite 204 (upstairs)
Encinitas, CA 92024

BEFORE THE GOVERNING BOARD OF THE
ENCINITAS UNION SCHOOL DISTRICT
SAN DIEGO COUNTY, CALIFORNIA

In the Matter of)	
)	Resolution No.16-2526
THE ADOPTION OF A FEE)	
JUSTIFICATION STUDY AND THE)	
INCREASE IN SCHOOL FACILITIES)	
FEES AND ADOPTION OF CEQA)	
<u>NOTICE OF EXEMPTION</u>)	

WHEREAS, Education Code section 17620 authorizes school districts to levy a fee, charge or dedication against any new construction within its boundaries for the purpose of funding the construction or reconstruction of school facilities; and

WHEREAS, the governing board (“Board”) of the Encinitas Union School District (“District”) has caused a study to be prepared by SchoolWorks entitled 2026 Developer Fee Justification Study (incorporated herein by reference and hereinafter referred to as the “Study”), which identifies the purpose and use for the fee and sets forth a reasonable relationship between the fee to be imposed, the type of development project on which the fee is to be imposed, and the increased school facilities made necessary by virtue of the burden imposed by the development; and

WHEREAS the Encinitas Union School District (“District”) by agreement with the high school district[s] sharing geographical territory with the District (“Fee-Sharing Agreement”), may levy 47.47% of the total fees permitted pursuant to Government Code Section 65995 for development in areas in which the District provides school services. The remaining permitted

fees shall be allocated to the high school district(s) within whose boundaries the residential, commercial, or industrial development shall occur; and

WHEREAS, pursuant to the authority of Government Code section 65995, subdivision (b)(3), the fees authorized by Education Code section 17620 have presently been established by the State Allocation Board (“SAB”) in the amount of \$5.38 per square foot for residential development and \$0.87 per square foot for commercial/industrial development; and

WHEREAS based upon the Fee-Sharing Agreement and in accordance with the increased level of fees permitted by the SAB pursuant to Government Code section 65995, the District may levy the following fees, which represent a percentage of the SAB Authorized Fee Amounts

1. \$2.55 per square foot of residential development (47.47% of \$5.38).
2. \$0.41 per square foot of commercial/industrial development (47.47% of \$0.87).

These amounts are justified by the needs of the District alone and do not include the needs of the high school district[s]; and

WHEREAS, Education Code section 17621 specifically exempts the adoption, increase, or imposition of any fee, charge, dedication or other requirement pursuant to Education Code section 17620 from the provisions of the California Environmental Quality Act (“CEQA”)(Pub. Resources Code Section 21000 et seq.); and

WHEREAS, upon a determination that the imposition of school facilities fees under Education Code section 17620 is exempt from CEQA, the District is entitled to file a Notice of Exemption with the County Clerk pursuant to California Code of Regulations, title 14, section 15062.

NOW, THEREFORE, BE IT RESOLVED, that the Board makes the following findings:

1. Prior to the adoption of this resolution (“Resolution”), the Board of the District conducted a public hearing at which oral and/or written presentations were made as part of the Board’s regularly scheduled meeting. Notice of the time and place of the meeting, including a general explanation of the matter to be considered has been published twice in the newspaper in accordance with Government Code sections 66017 and 66018. Additionally, at least 10 days prior to the meeting, the District made all relevant information available to the public indicating the cost, or estimated cost, of the construction or reconstruction of school facilities made necessary by the residential and/or commercial/industrial development to which the fee shall apply.
2. The purpose of the fees is to provide adequate school facilities for the students of the District who will be generated by residential and commercial/industrial development in the District.
3. The fees are to be used to finance the construction and reconstruction of school facilities.
4. There is a reasonable relationship between the need for the imposition of the fee and the types of development projects upon which the fees shall be imposed for the purpose of the construction or reconstruction of school facilities, in that residential, commercial and industrial development will generate students who will attend District schools. These students cannot be housed by the District without additional school facilities, or the reconstruction of existing school facilities. The fees will be used to fund all, or a portion of, new school facilities, or to reconstruct existing school facilities.

5. There is a reasonable relationship between the amount of the fee and the cost of the additional or reconstructed school facilities attributable to the development upon which the fee shall be imposed, in that the square footage of these developments has a direct relationship to the number of students that will be generated, and thus to the facilities the District must add and/or reconstruct in order to accommodate the students resulting from new development.
6. The District maintains a separate capital facilities account, or fund, as required by Government Code section 66006.
7. There are no other adequate sources of funds to meet the District's school facilities needs occasioned by, and resulting from, the construction of new residential and/or commercial/industrial development within the District.

AND BE IT FURTHER RESOLVED that the Board incorporates herein by reference, approves and adopts the Study entitled 2026 Developer Fee Justification Study, prepared by SchoolWorks which documents the need for the school facilities fees.

AND BE IT FURTHER RESOLVED that since the Study justifies fees at or in excess of the SAB Authorized Fee Amounts, the District, in accordance with Education Code sections 17620, et seq., and Government Code sections 65995, et seq., and the Fee-Sharing Agreement, hereby increases fees to the following amounts:

1. \$2.55 per square foot of residential development;
2. \$0.41 per square foot of commercial or industrial development except for Rental Self Storage facilities in which a fee of \$0.04 per square foot is justified.

AND BE IT FURTHER RESOLVED that the amount collected on behalf of both the District and the high school district[s] pursuant to this Resolution shall not exceed a total of

\$5.38 per square foot for residential development and \$0.87 per square foot of commercial or industrial development.

AND BE IT FURTHER RESOLVED that the increase in fees shall take effect sixty (60) days after the date of this Resolution.

AND BE IT FURTHER RESOLVED that the Superintendent of the District, or his or her designee, shall give notice of the Board's action herein to all cities and counties with jurisdiction over the territory of the District in accordance with the requirements of Education Code section 17620 and 17621, requesting that no building permits (or, for manufactured homes and mobile homes, certificates of occupancy) be issued on or after the date which is sixty (60) days after the date of this Resolution, without certification from the District that the fee specified herein have been paid. Said notice shall specify that collection of the fees is not subject to the restriction set forth in Government Code section 66007, subdivision (a) but, pursuant to subdivision (b) of that statute, the fees are to be collected prior to issuance of building permits.

AND BE IT FURTHER RESOLVED that developers of commercial or industrial development be provided the opportunity for a hearing to appeal the imposition of the fee on their developments.

AND BE IT FURTHER RESOLVED that nothing contained or expressed in this Resolution shall be construed to affect the District's authority to increase fees, enter into agreements with developers, or otherwise adopt or impose, to the extent permitted by law, additional fees, to fully mitigate the impact of residential and/or commercial/industrial development upon the District's school facilities.

AND BE IT FURTHER RESOLVED that the District's administration is authorized to make expenditures and to incur obligations of the fees for the purposes authorized by law.

AND BE IT FURTHER RESOLVED that the Board hereby finds that the increase in fees hereunder is statutorily exempt from the requirements of CEQA pursuant to Education Code section 17621.

AND BE IT FURTHER RESOLVED that this Board hereby adopts this Resolution and directs the Superintendent, or his or her designee, to file a certified copy of this Resolution, together with all relevant supporting documentation and a map clearly indicating the boundaries of the area subject to the fee, to each city and each county in which the District is situated, pursuant to Education Code section 17621.

This Resolution is adopted this 14th day of April, 2026 by the following vote:

AYES: 5

NOES: Ø

ABSTENTIONS: Ø

ABSENT: Ø


Clerk of the Governing Board

FEBRUARY 2026

2026 DEVELOPER FEE JUSTIFICATION STUDY
FOR
ENCINITAS UNION SCHOOL DISTRICT

DR. ANDREE GREY,
SUPERINTENDENT

PREPARED BY

SCHOOLWORKS, INC.
8700 Auburn Folsom Rd., #200
Granite Bay, CA 95746

PHONE: (916) 733-0402
WWW.SCHOOLWORKSGIS.COM



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- **Census Data**

- **Use of Developer Fees**

- **Site Development Costs**

- **Index Adjustment on the Assessment for Development – State Allocation Board Meeting of January 28, 2026**

- **Annual Adjustment to School Facility Program Grants**

Executive Summary

This Developer Fee Justification Study demonstrates that the Encinitas Union School District requires its share of the full statutory impact fee to accommodate impacts from development activity.

A fee of \$5.17 per square foot for residential construction and a fee of \$0.84 per square foot for commercial/industrial construction is currently assessed on applicable permits pulled in the District. The new fee amounts are **\$5.38** per square foot for residential construction and **\$0.87*** per square foot for commercial/industrial construction. This proposed increase represents \$0.21 per square foot and \$0.03 per square foot for residential and commercial/industrial construction, respectively. The District's share of the developer fees is 47.47%.

The following table shows the impact of the new fee amounts:

Table 1
Encinitas Union School District
Developer Fee Collection Rates

Totals	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$5.17	\$5.38	\$0.21
Commercial/Ind.	\$0.84	\$0.87	\$0.03
District Share:	47.47%		
Net Impact	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$2.45	\$2.55	\$0.10
Commercial/Ind.	\$0.40	\$0.41	\$0.01

*except for Rental Self Storage facilities in which a fee of \$0.04 per square foot is justified.

The total projected number of housing units to be built over the next five years is 1,370. The average area per unit is 1,311 square feet. This Study demonstrates a need of \$3.78 per square foot for residential construction.

Background

Education Code Section 17620 allows school districts to assess fees on new residential and commercial construction within their respective boundaries. These fees can be collected without special city or county approval, to fund the construction of new school facilities necessitated by the impact of residential and commercial development activity. In addition, these fees can also be used to fund the reconstruction of school facilities to accommodate students generated from new development projects. Fees are collected immediately prior to the time of the issuance of a building permit by the City or the County.

As new developments generate students, additional school facilities or modernization of existing facilities will be needed to house the new students. Because of the high cost associated with constructing school facilities and the District's limited budget, outside funding sources are required for future school construction. State and local funding sources for the construction and/or reconstruction of school facilities are limited.

The authority cited in Education Code Section 17620 states in part "... the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or reconstruction of school facilities." The legislation originally established the maximum fee rates at \$1.50 per square foot for residential construction and \$0.25 per square foot for commercial/industrial construction. Government Code Section 65995 provides for an inflationary increase in the fees every two years based on the changes in the Class B construction index. As a result of these adjustments, the fees authorized by Education Code 17620 are currently **\$5.38** per square foot of residential construction and **\$0.87** per square foot of commercial or industrial construction.

Purpose and Intent

Prior to levying developer fees, a district must demonstrate and document that a reasonable relationship exists between the need for new or reconstructed school facilities and residential, commercial and industrial development. The justification for levying fees is required to address three basic links between the need for facilities and new development. These links or nexus are:

Burden Nexus: A district must identify the number of students anticipated to be generated by residential, commercial and industrial development. In addition, the district shall identify the school facility and cost impact of these students.

Cost Nexus: A district must demonstrate that the fees to be collected from residential, commercial and industrial development will not exceed the cost of providing school facilities for the students to be generated from the development.

Benefit Nexus: A district must show that the construction or reconstruction of school facilities to be funded by the collection of developer fees will benefit the students generated by residential, commercial and industrial development.

The purpose of this Study is to document if a reasonable relationship exists between residential, commercial and industrial development and the need for new and/or modernized facilities in the Encinitas Union School District.

Following in this Study will be figures indicating the current enrollment and the projected development occurring within the attendance boundaries of the Encinitas Union School District. The students generated will then be loaded into existing facilities to the extent of available space. Thereafter, the facilities needed will be determined and an estimated cost will be assigned. The cost of the facilities will then be compared to the area of residential, commercial and industrial development to determine the amount of developer fees justified.



Enrollment and Impacts

In 2025/2026 the District's total enrollment (CBEDS) was 4,193 students. The enrollment by grade level is shown here in Table 2.

Table 2

**Encinitas Union School District
CURRENT ENROLLMENT**

Grade	2025/2026
TK/K	506
1	557
2	581
3	606
4	601
5	663
6	679
TK-6 Total	4,193

This data will be the basis for the enrollment impacts which will be presented later after a review of the development projections and the student generation factors.

Student Generation Factor

In determining the impact of new development, the District is required to show how many students will be generated from the new developments. To ensure that new development is paying only for the impact of those students that are being generated by new homes and businesses, the student generation factor is applied to the number of new housing units to determine development-related impacts.

The student generation factor identifies the number of students per housing unit and provides a link between residential construction projects and projections of enrollment. The State-wide factor used by the Office of Public School Construction is 0.40 for grades TK-6. For the purposes of this Study we will use the local factors to determine the students generated from new housing developments. This was done by comparing the number of housing units in the school district as of the 2020 Census to



the number of students currently enrolled in the school district. Table 3 shows the student generation factors for the various grade groupings.

Table 3

**Encinitas Union School District
STUDENT GENERATION FACTORS**

<u>Grades</u>	<u>Students per Household</u>
TK-6	0.14821

When using the Census data to determine the average district student yield rate, it is not possible to determine which students were living in multi-family units versus single family units. Therefore, only the total average yield rate is shown. The Census data does indicate that 63.6% of the total housing units within the district boundaries are single family units. It is reasonable to assume that the construction of new housing units would be similar to the current housing stock, which was confirmed by the various planning departments within the school district boundaries, and therefore the overall student generation rate will be used to determine student yields from the projected developments.

New Residential Development Impacts

The Encinitas Union School District has experienced an average new residential construction rate of approximately 274 units per year over the past four years. This was determined by reviewing the residential permits pulled and school development impact fees paid to the District. After contacting each of the planning departments within the school district boundaries, it was determined that the residential construction rate over the next five years will average 274 units per year. Projecting the average rate forward, we would expect that 1,370 units of residential housing will be built within the District boundaries over the next five years.

To determine the impact of residential development, a student projection is done. Applying the student generation factor of 0.1482 to the projected 1,370 units of residential housing, we expect that 203 elementary students will be generated from the new residential construction over the next five years.



The following table shows the projected impact of new development. The students generated by development will be utilized to determine the facility cost impacts to the school district.

Table 4

**Encinitas Union School District
DEVELOPMENT IMPACT ANALYSIS**

<u>Grades</u>	<u>Generation Rate</u>	<u>Students Generated</u>
TK to 6	0.1482	203



Existing Facility Capacity

To determine the need for additional school facilities, the capacity of the existing facilities must be identified and compared to current and anticipated enrollments. The District's existing building capacity will be calculated using the State classroom loading standards shown in Table 6. The following types of "support-spaces" necessary for the conduct of the District's comprehensive educational program, are not included as "teaching stations," commonly known as "classrooms" to the public:

Table 5
List of Core and Support Facilities

Library	Resource Specialist
Multipurpose Room	Gymnasium
Office Area	Lunch Room
Staff Workroom	P.E. Facilities

Because the District requires these types of support facilities as part of its existing facility and curriculum standards at its schools, new development's impact must not materially or adversely affect the continuance of these standards. Therefore, new development cannot require that the District house students in these integral support spaces.

Classroom Loading Standards

The following maximum classroom loading-factors are used to determine teaching-station "capacity," in accordance with the State legislation and the State School Building Program. These capacity calculations are also used in preparing and filing the baseline school capacity statement with the Office of Public School Construction.

Table 6
State Classroom Loading Standards

TK/Kindergarten	25 Students/Classroom
1 st -3 rd Grades	25 Students/Classroom
4 th -6 th Grades	25 Students/Classroom

Existing Facility Capacity

The State determines the baseline capacity by either loading all permanent teaching stations plus a maximum number of portables equal to 25% of the number of permanent classrooms or by loading all



permanent classrooms and only portables that are owned or have been leased for over 5 years. As allowed by law and required by the State, facility capacities are calculated by identifying the number of teaching stations at each campus. All qualified teaching stations were included in the calculation of the capacities at the time the initial inventory was calculated. To account for activity and changes since the baseline was established in 1998/99, the student grants (which represent the seats added either by new schools or additions to existing schools) for new construction projects funded by OPSC have been added. Using these guidelines the District's current State calculated capacity is shown in Table 7.

Table 7

Encinitas Union School District Summary of Existing Facility Capacity							
<u>School Facility</u>	<u>Permanent Classrooms</u>	<u>Portable Classrooms</u>	<u>Chargeable Portables</u>	<u>Total Chargeable Classrooms</u>	<u>State Loading Factor</u>	<u>State Funded Projects</u>	<u>Total State Capacity</u>
Grades TK-6	165	46	28	193	25	269	5,094
OPSC Funded Projects							
<u>Name</u>	<u>Project #</u>	<u>TK-6 Grants</u>	<u>7-8 Grants</u>	<u>Special Ed</u>	<u>CR</u>		
El Camino Creek Elem	1	269	0	0	31		

Table 7 shows a basic summary of the form and procedures used by OPSC (Office of Public School Construction) to determine the capacity of a school district. There were a total of 165 permanent classrooms in the District when the baseline was established. In addition, there were 46 portable classrooms. However, 18 of the portable classrooms were leased and therefore were not considered chargeable classrooms and are not included in the baseline capacity. Therefore, only the 28 owned portable classrooms are included in the baseline capacity. This results in a total classroom count of 193 and is referred to as the chargeable classrooms.

To determine the total capacity based on State standards, the capacity of the chargeable classrooms are multiplied by the State loading standards and then the capacity of the projects completed since 1998/99 (when the baseline was established) are added based on the State funded new construction projects. As Table 7 shows, the total State capacity of the District facilities is 5,094 students.

Students in Excess of Capacity by State Housing Standards

This next table compares the facility capacity with the space needed to determine if there is available space for new students from the projected developments. The space needed was determined by



reviewing the historic enrollments over the past four years along with the projected enrollment in five years to determine the number of seats needed to house the students within the existing homes. The seats needed were determined individually for each grade grouping. The projected enrollment in the space needed analysis did not include the impact of any new housing units.

Table 8

Encinitas Union School District
Summary of Available District Capacity

<u>School Facility</u>	<u>State Capacity</u>	<u>Space Needed</u>	<u>Available Capacity</u>
Grades TK-6	5,094	4,193	901

The District capacity of 5,094 is more than the space needed of 4,193, assuming the existing facilities remain in sufficient condition to maintain existing levels of service. The difference is 901 students.

Calculation of Development's Fiscal Impact on Schools

This section of the Study will demonstrate that a reasonable relationship exists between residential, commercial/industrial development and the need for school facilities in the Encinitas Union School District. To the extent this relationship exists, the District is justified in levying developer fees as authorized by Education Code Section 17620.

Reconstruction/Modernization Costs

In addition to any new facilities needed, there is also a need to reconstruct or modernize existing facilities to maintain the existing levels of service as students from new development continue to arrive in the District's facilities. To generate capacity, it may also be necessary to reopen closed school facilities. Such reopening often requires reconstruction to provide the District's existing level of service. For purposes of this report, the analysis of modernization/reconstruction includes the possible reopening and refurbishing of any closed or unused school facilities.

California has made a significant investment in school facilities through grants provided to help extend the useful life of public schools. The State's largest funding source for public school modernization projects, the School Facilities Program (SFP), requires a minimum local funding contribution of 40% of SFP-eligible costs. The State may provide up to 60% of the eligible costs at those times that State funding is available. However, SFP modernization grants frequently, if not usually, fall short of providing 60% of the actual costs for major modernizations. In the best cases, developer fees can help meet the District's required 40% local share. In many cases, developer fees may be necessary to supplement both the State's and the school district's contribution to a project.

Buildings generate eligibility for State reconstruction/modernization funding once they reach an age of 25 years old for permanent buildings and 20 years old for portables.

The usable life of school facilities is an important consideration in determining district facility needs into the future. The specific time when the projected residential developments will be built cannot be precisely predicted. Some new homes may be immediately occupied by families with school-aged children, while others may be immediately occupied who will have school-aged children in five to ten years. As a result of these variables, for each new home, the District must be prepared to house the students residing there for an extended period of time. Students generated by the next five years of development will need to be accommodated in District schools for a significant amount of time that



could exceed twenty years. Thus, the District will need to ensure that it has facilities in place for future decades.

As evidenced by the State Building program's use of the criteria that buildings older than twenty-five years (and portables older than twenty years) are eligible for modernization funds, school buildings require reconstruction/modernization to remain in use for students beyond the initial twenty to twenty-five years of life of those buildings. To the extent that the District has buildings older than twenty to twenty-five years old, the point will be reached without reconstruction/modernization that those buildings will no longer be able to provide the existing level of service to students, and may, in some circumstances, need to be closed entirely for health and safety reasons. However, because of the new development, reconstruction/modernization must occur to have available school housing for the students generated from development.

The following table shows the District's eligibility for modernization/reconstruction funding in the State Building Program.

Table 9

Modernization Project Needs

<u>School</u>	<u>Eligible Modernization Grants</u>		<u>State</u>	<u>District</u>	<u>Project</u>
	<u>Elem</u>	<u>Spec Ed</u>	<u>Funding</u>	<u>Share</u>	<u>Total</u>
Paul Ecke-Central Elementary	215	0	\$1,427,486	\$951,657	\$2,379,143
Ocean Knoll Elementary	205	0	\$1,361,091	\$907,395	\$2,268,486
Capri Elementary	96	0	\$709,378	\$472,918	\$1,182,296
Park Dale Lane Elementary	74	0	\$546,812	\$364,541	\$911,353
Mission Estancia	399	21	\$2,945,243	\$1,963,496	\$4,908,739
Flora Vista Elementary	190	0	\$1,308,992	\$872,661	\$2,181,653
La Costa Heights Elementary	600	19	\$4,251,577	\$2,834,385	\$7,085,962
TOTALS	1,779	40	\$12,550,579	\$8,367,053	\$20,917,632

Table 10

New Development Share of Modernization Costs

<u>Grade</u>	<u>Eligible</u>	<u>New Development</u>		
	<u>Modernization</u>	<u>Students</u>	<u>\$/Student</u>	<u>Amount</u>
	<u>Grants</u>			
TK-6	1,779	203	\$33,410	\$6,782,230

Includes students from new developments not housed in new facilities.
 Amounts based on State OPSC allowances for new construction projects.



This data is used to show that there are significant needs within the school District to invest in its existing facilities. Without modernizing its schools, the District could be forced to begin closing some of its buildings and schools.

To accurately account for the portion of the modernization projects attributed to the impact of new developments, only the students from new developments that were not already housed in new facilities are included in the net needs for modernization projects. As can be seen in the charts, the net modernization needs due to new development impacts are much less than the total District modernization needs.

Impact of New Residential Development

This next table compares the development-related enrollment to the available district capacity for each grade level and then multiplies the unhoused students by the new school construction costs to determine the total school facility costs related to the impact of new residential housing developments.

The modernization needs are included for the students not housed in new facilities, but who would be housed in existing facilities that are eligible for and need to be modernized to provide adequate housing and to maintain the existing level of service for the students generated by development.



Table 11

**Encinitas Union School District
 Summary of Residential Impact**

<u>School Facility</u>	<u>Students Generated</u>	<u>Available Space</u>	<u>Net Unhoused</u>	<u>Construction Cost Per Student</u>	<u>Total Facility Costs</u>
Elementary	203	901	0	\$33,410	\$0
Site Purchase: 0.0 acres					\$0
Site Development:					\$0
				New Construction needs due to development:	\$0
				Modernization needs due to development:	\$6,782,230
				TOTAL DEVELOPMENT IMPACT:	\$6,782,230
				Average cost per student:	\$33,410
				Total Residential Sq Ft:	1,796,070
				Residential Fee Justified:	\$3.78

The total need for school facilities based solely on the impact of the 1,370 new housing units projected over the next five years totals \$6,782,230. To determine the impact per square foot of residential development, this amount is divided by the total square feet of the projected developments. As calculated from the historic Developer Fee Permits, the average size home built has averaged 1,311 square feet. The total area for 1,370 new homes would therefore be 1,796,070 square feet. The total residential fee needed to be able to collect \$6,782,230 would be **\$3.78** per square foot.

Impact of Other Residential Development

In addition to new residential development projects that typically include new single-family homes and new multi-family units, the District can also be impacted by additional types of new development projects. These include but are not limited to redevelopment projects, additions to existing housing units including ADU's (accessory dwelling unit), and replacement of existing housing units with new housing units.

These development projects are still residential projects and therefore it is reasonable to assume they would have the same monetary impacts per square foot as the new residential development projects. However, only the impact is considered of the net increase in area for the residential projects. Therefore, the development impact fees should only be charged for other residential developments if the new building(s) exceed the square footage area of the previous building(s). If the new building is larger than the existing building, then it is reasonable to assume that additional students could be generated by the project. The project would only pay for the development impact fees for the net increase in assessable space generated by the development project. Education Code allows for an exemption from development impacts fees for any additions to existing residential structures that are 500 square feet or less.

Impact of Commercial/Industrial Development

There is a correlation between the growth of commercial/industrial firms/facilities within a community and the generation of school students within most business service areas. Fees for commercial/industrial can only be imposed if the residential fees will not fully mitigate the cost of providing school facilities to students from new development.

The approach utilized in this section is to apply statutory standards, U.S. Census employment statistics, and local statistics to determine the impact of future commercial/industrial development projects on the District. Many of the factors used in this analysis were taken from the U.S. Census, which remains the most complete and authoritative source of information on the community in addition to the "1990 SanDAG Traffic Generators Report".

Employees per Square Foot of Commercial Development

Results from a survey published by the San Diego Association of Governments "1990 San DAG Traffic Generators" are used to establish numbers of employees per square foot of building area to be anticipated in new commercial or industrial development projects. The average number of workers per 1,000 square feet of area ranges from 0.06 for Rental Self Storage to 4.79 for Standard Commercial Offices. The generation factors from that report are shown in the following table.



Table 12

Commercial/Industrial Category	Average Square Foot Per Employee	Employees Per Average Square Foot
Banks	354	0.00283
Community Shopping Centers	652	0.00153
Neighborhood Shopping Centers	369	0.00271
Industrial Business Parks	284	0.00352
Industrial Parks	742	0.00135
Rental Self Storage	15541	0.00006
Scientific Research & Development	329	0.00304
Lodging	882	0.00113
Standard Commercial Office	209	0.00479
Large High Rise Commercial Office	232	0.00431
Corporate Offices	372	0.00269
Medical Offices	234	0.00427

Source: 1990 SanDAG Traffic Generators report

Students per Employee

The number of students per employee is determined by using the S0802: Means of Transportation to Work by Selected Characteristics 2018-2022 American Community Survey 5-Year Estimates and DP1: Profile of General Population and Housing Characteristics 2020: DEC Demographic Profile for the District. There were 34,947 employees and 28,290 homes in the District. This represents a ratio of 1.2353 employees per home.

There were 5,342 school age children attending the District in 2020. This is a ratio of 0.1529 students per employee. This ratio, however, must be reduced by including only the percentage of employees that worked in their community of residence (22.8%), because only those employees living in the District will impact the District's school facilities with their children. The net ratio of students per employee in the District is 0.0349.

School Facilities Cost per Student

Facility costs for housing commercially generated students are the same as those used for residential construction. The cost factors used to assess the impact from commercial development projects are contained in Table 11.

Residential Offset

When additional employees are generated in the District as a result of new commercial/industrial development, fees will also be charged on the residential units necessary to provide housing for the



employees living in the District. To prevent a commercial or industrial development from paying for the portion of the impact that will be covered by the residential fee, this amount has been calculated and deducted from each category. The residential offset amount is calculated by multiplying the following factors together and dividing by 1,000 (to convert from cost per 1,000 square feet to cost per square foot).

- Employees per 1,000 square feet (varies from a low of 0.06 for rental self storage to a high of 4.79 for office building).
- Percentage of employees that worked in their community of residence (22.8 percent).
- Housing units per employee (0.8095). This was derived from the 2018-2022 ACS 5 Year Estimates and DP1 data for the District, which indicates there were 28,290 housing units and 34,947 employees.
- Percentage of employees that will occupy new housing units (75 percent).
- Average square feet per dwelling unit (1,311).
- Residential fee charged by the District (\$2.55 (47.47% of \$5.38) per square foot).
- Average cost per student was determined in Table 11.

The following table shows the calculation of the school facility costs generated by a square foot of new commercial/industrial development for each category of development.

Table 13

Encinitas Union School District Summary of Commercial and Industrial Uses							
<u>Type</u>	<u>Employees per 1,000 Sq. Ft.</u>	<u>Students per Employee</u>	<u>Students per 1,000 Sq. Ft.</u>	<u>Average Cost per Student</u>	<u>Cost per Sq. Ft.</u>	<u>Residential offset per Sq. Ft.</u>	<u>Net Cost per Sq. Ft.</u>
Banks	2.83	0.0349	0.099	\$33,410	\$3.30	\$1.31	\$1.99
Community Shopping Centers	1.53	0.0349	0.053	\$33,410	\$1.78	\$0.71	\$1.07
Neighborhood Shopping Centers	2.71	0.0349	0.094	\$33,410	\$3.16	\$1.25	\$1.91
Industrial Business Parks	3.52	0.0349	0.123	\$33,410	\$4.10	\$1.63	\$2.47
Industrial Parks	1.35	0.0349	0.047	\$33,410	\$1.57	\$0.62	\$0.95
Rental Self Storage	0.06	0.0349	0.002	\$33,410	\$0.07	\$0.03	\$0.04
Scientific Research & Development	3.04	0.0349	0.106	\$33,410	\$3.54	\$1.41	\$2.13
Lodging	1.13	0.0349	0.039	\$33,410	\$1.32	\$0.52	\$0.80
Standard Commercial Office	4.79	0.0349	0.167	\$33,410	\$5.58	\$2.22	\$3.36
Large High Rise Commercial Office	4.31	0.0349	0.150	\$33,410	\$5.02	\$1.99	\$3.03
Corporate Offices	2.69	0.0349	0.094	\$33,410	\$3.13	\$1.24	\$1.89
Medical Offices	4.27	0.0349	0.149	\$33,410	\$4.97	\$1.98	\$2.99

*Based on 1990 SanDAG Traffic Generator Report

Net Cost per Square Foot

Since the Districts share of the State Maximum Fee is now \$0.41 (47.47% of \$0.87) for commercial/industrial construction, the District is justified in collecting the maximum fee for all categories except for Rental Self Storage. The District can justify the collection of \$0.04 per square foot of Rental Self Storage construction.

Verifying the Sufficiency of the Development Impact

Education Code Section 17620 requires districts to find that fee revenues will not exceed the cost of providing school facilities to the students generated by the development paying the fees. This section shows that the fee revenues do not exceed the impact of the new development.

The total need for school facilities resulting from new development totals \$6,782,230. The amount the District would collect over the five-year period at the maximum rate of \$2.55 (47.47% of \$5.38) for residential and \$0.41 (47.47% of \$0.87) for commercial/industrial development would be as follows:

$\$2.55 \times 1,370 \text{ homes} \times 1,311 \text{ sq ft per home} = \$4,579,979$ for Residential

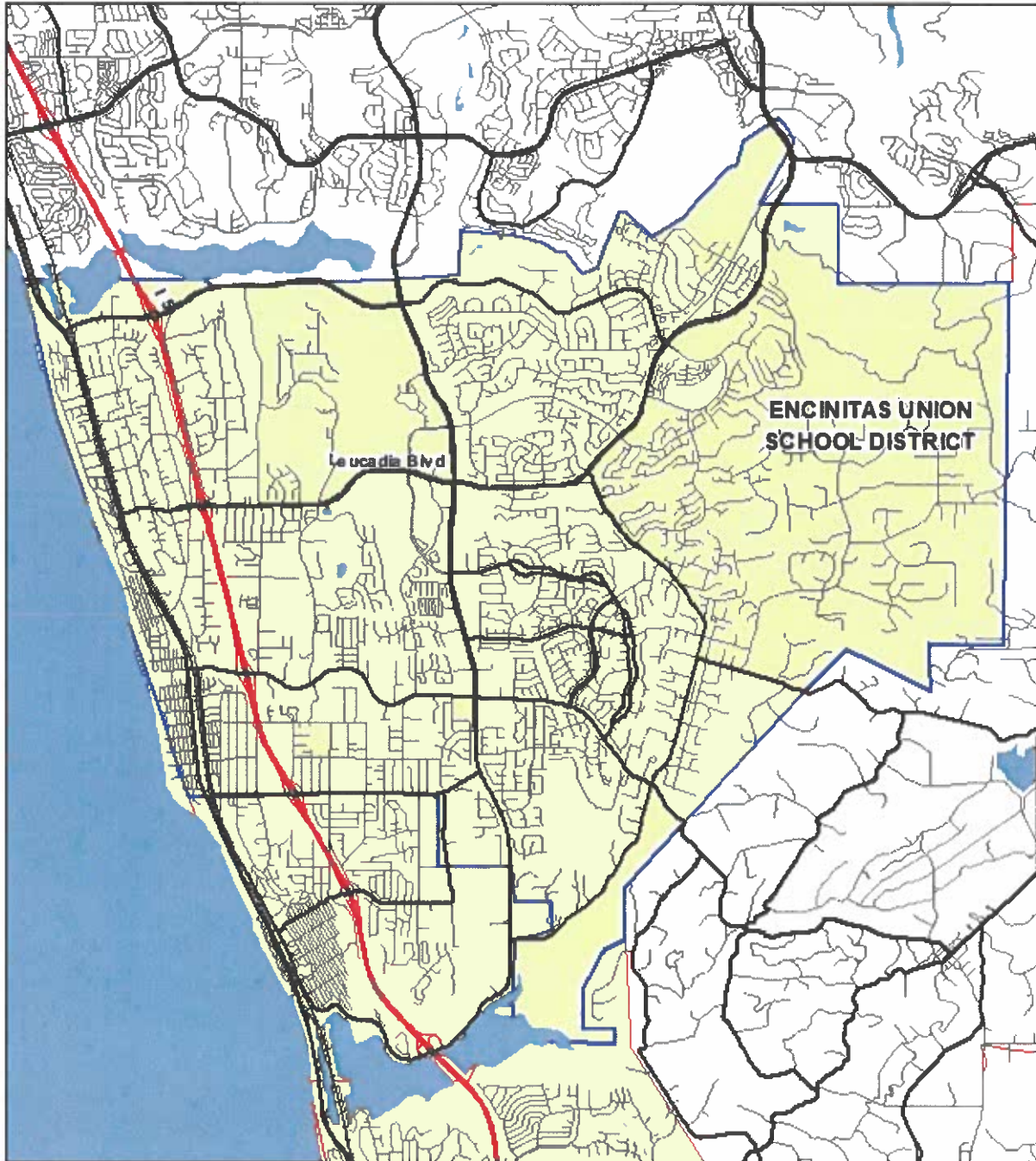
$\$0.41 \times 26,377 \text{ sq ft per year} \times 5 \text{ years} = \$54,073$ for Commercial/Industrial

Total projected 5 year income: \$4,634,052

The estimated income is less than the projected facility needs due to the impact of new development projects.

District Map

The following map shows the extent of the areas for which development fees are applicable to the Encinitas Union School District.



Conclusion

Based on the data contained in this Study, it is found that a reasonable relationship exists between residential, commercial/industrial development and the need for school facilities in the Encinitas Union School District. The following three nexus tests required to show justification for levying fees have been met:

Burden Nexus: New residential development will generate an average of 0.1482 TK-6 grade students per unit. Because the District does not have adequate facilities for all the students generated by new developments, the District will need to build additional facilities and/or modernize/reconstruct the existing facilities to maintain existing level of services in which the new students will be housed.

Cost Nexus: The cost to provide new and reconstructed facilities is an average of \$3.78 per square foot of residential development. Each square foot of residential development will generate \$2.55 (47.47% of \$5.38) in developer fees resulting in a shortfall of \$1.23 per square foot.

Benefit Nexus: The developer fees to be collected by the Encinitas Union School District will be used for the provision of additional and reconstructed or modernized school facilities. This will benefit the students to be generated by new development by providing them with adequate educational school facilities.

The District's planned use of the fees received from development impacts will include the following types of projects, each of which will benefit students from new developments.

- 1) **New Schools:** When there is enough development activity occurring in a single area, the District will build a new school to house the students from new developments.
- 2) **Additions to Existing Schools:** When infill development occurs, the District will accommodate students at existing schools by building needed classrooms and/or support facilities such as cafeterias, restrooms, gyms and libraries as needed to increase the school capacity. Schools may also need upgrades of the technology and tele-communication systems to be able to increase their capacity.



- 3) **Portable Replacement Projects:** Some of the District's capacity is in portables and therefore may not be included in the State's capacity calculations. These portables can be replaced with new permanent or modular classrooms to provide adequate space for students from new developments. These projects result in an increase to the facility capacity according to State standards. In addition, old portables that have reached the end of their life expectancy, will need to be replaced to maintain the existing level of service. These types of projects are considered modernization projects in the State Building Program. If development impacts did not exist, the old portables could be removed.

- 4) **Modernization/Upgrade Projects:** In many cases, students from new developments are not located in areas where new schools are planned to be built. The District plans to modernize or upgrade older schools to be equivalent to new schools so students will be housed in equitable facilities to those students housed in new schools. These projects may include updates to the building structures to meet current building standards, along with upgrades to the current fire and safety standards and any access compliance standards.

The District plans to use the developer fees on their next batch of modernization projects.

Per the District's agreement with the High School District, the elementary share of the developer fees collected is 47.47%. The reasonable relationship identified by these findings provides the required justification for the Encinitas Union School District to levy the maximum fees of \$2.55 (47.47% of \$5.38) per square foot for residential construction and \$0.41 (47.47% of \$0.87) per square foot for commercial/industrial construction, except for Rental Self Storage facilities in which a fee of \$0.04 per square foot is justified as authorized by Education Code Section 17620.

Appendices

2026 Developer Fee Justification Study

Encinitas Union School District

PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS



Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

Encinitas Union Elementary School District, California		
Label	Count	Percent
> SEX AND AGE		
> MEDIAN AGE BY SEX		
> RACE		
> TOTAL RACES TALLIED [1]		
> HISPANIC OR LATINO		
> HISPANIC OR LATINO BY RACE		
> RELATIONSHIP		
> HOUSEHOLDS BY TYPE		
▼ HOUSING OCCUPANCY		
▼ Total housing units	30,191	100.0%
Occupied housing units	28,290	93.7%
▼ Vacant housing units	1,901	6.3%
For rent	481	1.6%
Rented, not occupied	45	0.1%
For sale only	167	0.6%
Sold, not occupied	59	0.2%
For seasonal, recreational, or	772	2.6%
All other vacants	377	1.2%
▼ VACANCY RATES		

Table Notes

PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS

Survey/Program: Decennial Census

Year: 2020

Table ID: DP1

Note: For information on data collection, confidentiality protection, nonsampling error, subject definitions, and guidance on using the data, visit the 2020 Census Demographic and Housing Characteristics File (DHC) Technical Documentation webpage.

To protect respondent confidentiality, data have undergone disclosure avoidance methods which add "statistical noise" - small, random additions or subtractions - to the data so that no one can reliably link the published data to a specific person or household. The Census Bureau encourages data users to aggregate small populations and geographies to improve accuracy and diminish implausible results.

An "(X)" means not applicable.

An "-" means the statistic could not be computed because there were an insufficient number of observations.

[1] The alone or in combination categories are tallies of responses rather than respondents. That is, the alone or in combination categories are not mutually exclusive. Individuals who reported two races were counted in two separate and distinct alone or in combination race categories, while those who reported three races were counted in three categories, and so on. For example, a respondent who indicated "White

and Black or African American" was counted in the White alone or in combination category as well as in the Black or African American alone or in combination category. Consequently, the sum of all alone or in combination categories equals the number of races reported (i.e., responses), which exceeds the total population.

[2] "Child" includes biological, adopted, and stepchildren of the householder.

[3] "Own children" includes biological, adopted, and stepchildren of the householder.

[4] The homeowner vacancy rate is the proportion of the homeowner inventory that is vacant "for sale." It is computed by dividing the total number of vacant units "for sale only" by the sum of owner-occupied units, vacant units that are "for sale only," and vacant units that have been sold but not yet occupied; and then multiplying by 100.

[5] The rental vacancy rate is the proportion of the rental inventory that is vacant "for rent." It is computed by dividing the total number of vacant units "for rent" by the sum of the renter-occupied units, vacant units that are "for rent," and vacant units that have been rented but not yet occupied; and then multiplying by 100.

Source: U.S. Census Bureau, 2020 Census Demographic Profile

Selected Housing Characteristics

Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

Encinitas Union Elementary School District, California				
Label	Estimate	Margin of Error	Percent	Percent Margin of Err
HOUSING OCCUPANCY				
▼ Total housing units	29,690	±985	29.690	(
Occupied housing units	27,532	±944	92.7%	±1
Vacant housing units	2,158	±429	7.3%	±1
Homeowner vacancy rate	0.6	±0.4	(X)	(
Rental vacancy rate	7.1	±2.8	(X)	(
UNITS IN STRUCTURE				
▼ Total housing units	29,690	±985	29.690	(
1-unit, detached	18,116	±847	61.0%	±2
1-unit, attached	4,218	±496	14.2%	±1
2 units	688	±224	2.3%	±C
3 or 4 units	1,181	±341	4.0%	±
5 to 9 units	1,112	±221	3.7%	±C
10 to 19 units	1,286	±279	4.3%	±C
20 or more units	2,328	±423	7.8%	±1
Mobile home	761	±207	2.6%	±C
Boat, RV, van, etc.	0	±31	0.0%	±(
YEAR STRUCTURE BUILT				
▼ Total housing units	29,690	±985	29.690	(

Table Notes

Selected Housing Characteristics

Survey/Program: American Community Survey

Year: 2022

Estimates: 5-Year

Table ID: DP04

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, the decennial census is the official source of population totals for April 1st of each decennial year. In between censuses, the Census Bureau's Population Estimates Program produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Information about the American Community Survey (ACS) can be found on the ACS website. Supporting documentation including code lists, subject definitions, data accuracy, and statistical testing, and a full list of ACS tables and table shells (without estimates) can be found on the Technical Documentation section of the ACS website.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the Methodology section.

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

Households not paying cash rent are excluded from the calculation of median gross rent.

Telephone service data are not available for certain geographic areas due to problems with data collection of this question that occurred in 2019. Both ACS 1-year and ACS 5-year files were affected and may take several years in the ACS 5-year files until the estimates are available for the geographic areas affected.

The 2018-2022 American Community Survey (ACS) data generally reflect the March 2020 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances, the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineation lists due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on 2020 Census data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

The estimate could not be computed because there were an insufficient number of sample observations. For a ratio of medians estimate, one or both of the median estimates falls in the lowest interval or highest interval of an open-ended distribution. For a 5-year median estimate, the margin of error associated with a median was larger than the median itself.

The estimate or margin of error cannot be displayed because there were an insufficient number of sample cases in the selected geographic area.

(X)

The estimate or margin of error is not applicable or not available.

median-

The median falls in the lowest interval of an open-ended distribution (for example "2,500-")

median+

The median falls in the highest interval of an open-ended distribution (for example "250,000+").

**

The margin of error could not be computed because there were an insufficient number of sample observations.

The margin of error could not be computed because the median falls in the lowest interval or highest interval of an open-ended distribution.

A margin of error is not appropriate because the corresponding estimate is controlled to an independent population or housing estimate. Effectively, the corresponding estimate has no sampling error and the margin of error may be treated as zero.

Means of Transportation to Work by Selected Characteristics

Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

		Encinitas Union Elementary School District, California	
		Total	Car, truck
Label		Estimate	Margin of Error
Workers 16 years and over		34,947	±1,482
> AGE			
> SEX			
> RACE AND HISPANIC OR LATINO ORIGIN			
> NATIVITY AND CITIZENSHIP STATUS			
> LANGUAGE SPOKEN AT HOME AND ABILITY TO SPEAK ENGLISH			
> EARNINGS IN THE PAST 12 MONTHS (IN 2022 INFLATION-ADJUSTED DOLLARS) FOR WORKERS			
> POVERTY STATUS IN THE PAST 12 MONTHS			
> Workers 16 years and over		34,947	±1,482
> Workers 16 years and over who did not work from home		25,620	±1,378
> TIME OF DEPARTURE TO GO TO WORK			
▼ TRAVEL TIME TO WORK			
Less than 10 minutes		10.4%	±2.0
10 to 14 minutes		12.4%	±2.1
15 to 19 minutes		16.7%	±2.0
20 to 24 minutes		16.2%	±1.7
25 to 29 minutes		6.3%	±1.0
30 to 34 minutes		15.2%	±1.6

Table Notes

Means of Transportation to Work by Selected Characteristics

Survey/Program: American Community Survey

Year: 2022

Estimates: 5-Year

Table ID: S0802

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, the decennial census is the official source of population totals for April 1st of each decennial year. In between censuses, the Census Bureau's Population Estimates Program produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Information about the American Community Survey (ACS) can be found on the ACS website. Supporting documentation including code lists, subject definitions, data accuracy, and statistical testing, and a full list of ACS tables and table shells (without estimates) can be found on the Technical Documentation section of the ACS website.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the Methodology section.

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

Foreign born excludes people born outside the United States to a parent who is a U.S. citizen.

Workers include members of the Armed Forces and civilians who were at work last week.

Industry titles and their 4-digit codes are based on the 2017 North American Industry Classification System. The industry categories adhere to the guidelines issued in Clarification Memorandum No. "NAICS Alternate Aggregation Structure for Use By U.S. Statistical Agencies," issued by the Office of Management and Budget.

Occupation titles and their 4-digit codes are based on the 2018 Standard Occupational Classification.

When information is missing or inconsistent, the Census Bureau logically assigns an acceptable value using the response to a related question or questions. If a logical assignment is not possible, data are filled using a statistical process called allocation, which uses a similar individual or household to provide a donor value. The "Allocated" section is the number of respondents who received an allocated value for a particular subject.

Several means of transportation to work categories were updated in 2019. For more information, see: Change to Means of Transportation.

In 2019, methodological changes were made to the class of worker question. These changes involved modifications to the question wording, the category wording, and the visual format of the categories on the questionnaire. The format for the class of worker categories are now listed under the headings "Private Sector Employee," "Government Employee," and "Self-Employed or Other." Additionally, the category of Active Duty was added as one of the response categories under the "Government Employee" section for the mail questionnaire. For more detailed information about the

2019 changes, see the 2016 American Community Survey Content Test Report for Class of Worker located at http://www.census.gov/library/working-papers/2017/acs/2017_Martinez_01.html.

The 2018-2022 American Community Survey (ACS) data generally reflect the March 2020 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances, the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineation lists due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on 2020 Census data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

- The estimate could not be computed because there were an insufficient number of sample observations. For a ratio of medians estimate, one or both of the median estimates falls in the lowest interval or highest interval of an open-ended distribution. For a 5-year median estimate, the margin of error associated with a median was larger than the median itself.

N

The estimate or margin of error cannot be displayed because there were an insufficient number of sample cases in the selected geographic area.

(X)

The estimate or margin of error is not applicable or not available.

median-

The median falls in the lowest interval of an open-ended distribution (for example "2,500-")

median+

The median falls in the highest interval of an open-ended distribution (for example "250,000+").

**

The margin of error could not be computed because there were an insufficient number of sample observations.

The margin of error could not be computed because the median falls in the lowest interval or highest interval of an open-ended distribution.

A margin of error is not appropriate because the corresponding estimate is controlled to an independent population or housing estimate. Effectively, the corresponding estimate has no sampling error and the margin of error may be treated as zero.



Use of Developer Fees:

A School District can use the revenue collected on residential and commercial/industrial construction for the purposes listed below:

- Purchase or lease of interim school facilities to house students generated by new development pending the construction of permanent facilities.
- Purchase or lease of land for school facilities for such students.
- Acquisition of school facilities for such students, including:
 - Construction
 - Modernization/reconstruction
 - Architectural and engineering costs
 - Permits and plan checking
 - Testing and inspection
 - Furniture, Equipment and Technology for use in school facilities
- Legal and other administrative costs related to the provision of such new facilities
- Administration of the collection of, and justification for, such fees, and
- Any other purpose arising from the process of providing facilities for students generated by new development.

Following is an excerpt from the Education Code that states the valid uses of the Level 1 developer fees. It refers to construction and reconstruction. The term reconstruction was originally used in the Leroy Greene program. The term modernization is currently used in the 1998 State Building Program and represents the same scope of work used in the original reconstruction projects.

Ed Code Section 17620. (a) (1) The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code. This fee, charge, dedication, or other requirement may be applied to construction only as follows: ...

The limitations referred to in this text describe the maximum amounts that can be charged for residential and commercial/industrial projects and any projects that qualify for exemptions. They do not limit the use of the funds received.



Determination of Average State allowed amounts for Site Development Costs

Elementary Schools			Original	Inflation	2009 Adjusted	Project	2009	
<u>District</u>	<u>Project #</u>	<u>Acres</u>	<u>OPSC Site Development</u>	<u>Factor</u>	<u>Site Development</u>	<u>Year</u>	<u>Cost/Acre</u>	
Davis Jt Unified	3	9.05	\$532,282	38.4%	\$1,473,469	2004	\$162,814	
Dry Creek Jt Elem	2	8.5	\$516,347	46.2%	\$1,509,322	2002	\$177,567	
Dry Creek Jt Elem	5	11.06	\$993,868	20.1%	\$2,387,568	2006	\$215,874	
Elk Grove Unified	5	12.17	\$556,011	48.2%	\$1,648,316	2001	\$135,441	
Elk Grove Unified	10	11	\$690,120	48.2%	\$2,045,888	2001	\$185,990	
Elk Grove Unified	11	10	\$702,127	48.2%	\$2,081,483	2001	\$208,148	
Elk Grove Unified	14	10	\$732,837	46.2%	\$2,142,139	2002	\$214,214	
Elk Grove Unified	16	9.86	\$570,198	46.2%	\$1,666,733	2002	\$169,040	
Elk Grove Unified	17	10	\$542,662	46.2%	\$1,586,243	2002	\$158,624	
Elk Grove Unified	20	10	\$710,730	43.2%	\$2,034,830	2003	\$203,483	
Elk Grove Unified	25	10	\$645,923	38.4%	\$1,788,052	2004	\$178,805	
Elk Grove Unified	28	10.03	\$856,468	24.4%	\$2,130,974	2005	\$212,460	
Elk Grove Unified	39	9.91	\$1,007,695	20.1%	\$2,420,785	2006	\$244,277	
Folsom-Cordova Unified	1	9.79	\$816,196	20.1%	\$1,960,747	2006	\$200,281	
Folsom-Cordova Unified	4	7.5	\$455,908	46.2%	\$1,332,654	2002	\$177,687	
Folsom-Cordova Unified	5	8	\$544,213	46.2%	\$1,590,776	2002	\$198,847	
Folsom-Cordova Unified	8	8.97	\$928,197	11.2%	\$2,063,757	2007	\$230,073	
Galt Jt Union Elem	2	10.1	\$1,033,044	38.4%	\$2,859,685	2004	\$283,137	
Lincoln Unified	1	9.39	\$433,498	46.2%	\$1,267,148	2002	\$134,947	
Lodi Unified	3	11.2	\$555,999	46.2%	\$1,625,228	2002	\$145,110	
Lodi Unified	10	11.42	\$1,245,492	46.2%	\$3,640,669	2002	\$318,798	
Lodi Unified	19	9.93	\$999,164	11.2%	\$2,221,545	2007	\$223,721	
Lodi Unified	22	10	\$1,416,212	7.7%	\$3,051,426	2008	\$305,143	
Natomas Unified	6	8.53	\$685,284	46.2%	\$2,003,138	2002	\$234,834	
Natomas Unified	10	9.83	\$618,251	43.2%	\$1,770,061	2003	\$180,067	
Natomas Unified	12	9.61	\$735,211	24.4%	\$1,829,275	2005	\$190,351	
Rocklin Unified	8	10.91	\$593,056	46.2%	\$1,733,548	2002	\$158,895	
Stockton Unified	1	12.66	\$1,462,232	7.7%	\$3,150,582	2008	\$248,861	
Stockton Unified	2	10.5	\$781,675	43.2%	\$2,237,946	2003	\$213,138	
Stockton Unified	6	12.48	\$1,136,704	20.1%	\$2,730,703	2006	\$218,806	
Tracy Jt Unified	4	10	\$618,254	46.2%	\$1,807,204	2002	\$180,720	
Tracy Jt Unified	10	10	\$573,006	38.4%	\$1,586,202	2004	\$158,620	
Washington Unified	1	8	\$446,161	46.2%	\$1,304,163	2002	\$163,020	
Washington Unified	4	10.76	\$979,085	7.7%	\$2,109,575	2008	\$196,057	2026
Totals		341.16			\$68,791,833	Average	\$201,641	Adjusted Value \$353,149
Middle and High Schools			Original	Inflation	2009 Adjusted	Project	2009	
<u>District</u>	<u>Project #</u>	<u>Acres</u>	<u>OPSC Site Development</u>	<u>Factor</u>	<u>Site Development</u>	<u>Year</u>	<u>Cost/Acre</u>	
Western Placer Unified	4	19.3	\$5,973,312	24.4%	\$7,431,085	2005	\$385,030	
Roseville City Elem	2	21.6	\$1,780,588	48.2%	\$2,639,311	2000	\$122,190	
Elk Grove Unified	4	66.2	\$8,659,494	48.2%	\$12,835,704	2000	\$193,893	
Elk Grove Unified	13	76.4	\$9,791,732	48.2%	\$14,513,986	2001	\$189,974	
Elk Grove Unified	18	84.3	\$13,274,562	43.2%	\$19,002,626	2003	\$225,417	
Grant Jt Union High	2	24	\$2,183,840	48.2%	\$3,237,039	2000	\$134,877	
Center Unified	1	21.2	\$1,944,310	46.2%	\$2,841,684	2002	\$134,042	
Lodi Unified	2	13.4	\$1,076,844	46.2%	\$1,573,849	2002	\$117,451	
Lodi Unified	6	13.4	\$2,002,164	46.2%	\$2,926,240	2002	\$218,376	
Galt Jt Union Elem	1	24.9	\$2,711,360	46.2%	\$3,962,757	2002	\$159,147	
Tahoe Truckee Unified	2	24	\$2,752,632	43.2%	\$3,940,412	2003	\$164,184	
Davis Unified	5	23.3	\$3,814,302	43.2%	\$5,460,199	2003	\$234,343	
Woodland Unified	3	50.2	\$8,664,700	46.2%	\$12,663,792	2002	\$252,267	
Sacramento City Unified	1	35.2	\$4,813,386	46.2%	\$7,034,949	2002	\$199,856	
Lodi Unified	4	47	\$7,652,176	46.2%	\$11,183,950	2002	\$237,956	
Stockton Unified	3	49.1	\$8,959,088	43.2%	\$12,824,996	2003	\$261,202	
Natomas Unified	11	38.7	\$3,017,002	38.4%	\$4,175,850	2004	\$107,903	
Rocklin Unified	11	47.1	\$11,101,088	24.4%	\$13,810,282	2005	\$293,212	2026
Totals		679.3			\$142,058,711	Average	\$209,125	Adjusted Value \$332,244
Middle Schools:		260.7			\$49,447,897	Middle	\$189,704	\$332,244
High Schools:		418.6			\$92,610,814	High	\$221,217	\$387,434

INDEX ADJUSTMENT ON THE ASSESSMENT FOR DEVELOPMENT

PURPOSE OF REPORT

To adopt the biennial index adjustment on the assessment for development, which may be levied pursuant to Education Code Section 17620.

DESCRIPTION

The law requires the maximum assessment for development be adjusted every two years by the change in the Class B construction cost index, as determined by the State Allocation Board (Board) in each calendar year. This item requests that the Board make the adjustment based on the change reflected using the RS Means (The Gordian Group, Inc.¹) index.

AUTHORITY

Education Code Section 17620(a)(1) states the following: "The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code..."

Government Code Section 65995(b)(3) states the following: "The amount of the limits set forth in paragraphs (1) and (2) shall be increased in 2000, and every two years thereafter, according to the adjustment for inflation set forth in the statewide cost index for class B construction, as determined by the State Allocation Board at its January meeting, which increase shall be effective as of the date of that meeting."

BACKGROUND

There are three levels that may be levied for developer fees. The fees are levied on a per-square foot basis. The lowest fee, Level I, is assessed if the district conducts a Justification Study that establishes the connection between the development coming into the district and the assessment of fees to pay for the cost of the facilities needed to house future students. The Level II fee is assessed if a district makes a timely application to the Board for new construction funding, conducts a School Facility Needs Analysis pursuant to Government Code Section 65995.6, and satisfies at least two of the requirements listed in Government Code Section 65995.5(b)(3). The Level III fee can be assessed if a school district meets requirements to adopt Level I fees and the Board is no longer approving apportionments for new construction due to a lack of state funds available for this

¹ Effective September 27, 2025, RS Means was transitioned under the company's unified entity, The Gordian Group, Inc.

purpose. Level III fees are intended to provide up to 100 percent of the School Facility Program new construction project cost.

STAFF ANALYSIS/STATEMENTS

A historical comparison of the assessment rates for development fees for 2022 and 2024 are shown below for information. According to the RS Means (The Gordian Group, Inc.), the cost index for Class B construction increased by 4.06 percent during the two-year period from January 2024 to January 2026, requiring the assessment for development fees to be adjusted as follows beginning January 2026:

	<u>2022</u>	<u>2024</u>	<u>2026</u>
Residential	\$4.79	\$5.17	\$5.38
Commercial/Industrial	\$0.78	\$0.84	\$0.87

RECOMMENDATION

Increase the 2026 maximum Level I assessment for development in the amount of 4.06 percent using the RS Means (The Gordian Group, Inc.) Index to be effective immediately.

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

PURPOSE OF REPORT

To adopt the annual adjustment to the School Facility Program (SFP) grants based on the change in construction costs pursuant to the Education Code (EC) and SFP Regulations.

DESCRIPTION

This item presents the State Allocation Board (Board) with the annual adjustment to the SFP grants based on the statewide cost index for Class B construction. Each year the Board adjusts the SFP grants to reflect construction cost changes. In January 2016, the Board adopted the RS Means (The Gordian Group, Inc.¹) index for use in 2016 and future years. This item presents the 2026 annual adjustment to SFP grants based on the RS Means (The Gordian Group, Inc.) index.

AUTHORITY

See Attachment A.

STAFF ANALYSIS/STATEMENTS

At the January 2016 meeting, the Board adopted an increase to the SFP grants using the RS Means (The Gordian Group, Inc.) Construction Cost Index (CCI) as the statewide cost index for Class B construction.

The current rate of change between 2025 and 2026 for the RS Means (The Gordian Group, Inc.) Class B CCI is 3.56 percent. The chart below reflects the amounts previously adopted for 2025 compared to the potential amount for the new construction base grants.

RS Means (Gordian Group, Inc.) 3.56%			
Grade Level	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-25	<i>Potential Grant Per Pupil Effective 1-1-26</i>
Elementary	1859.71	\$15,847	\$16,411
Middle	1859.71	\$16,761	\$17,358
High	1859.71	\$21,327	\$22,086
Special Day Class – Severe	1859.71.1	\$44,531	\$46,116
Special Day Class – Non-Severe	1859.71.1	\$29,782	\$30,842

¹ Effective September 27, 2025, RS Means was transitioned under the company's unified entity, The Gordian Group, Inc.

STAFF ANALYSIS/STATEMENTS (cont.)

The following chart shows the amounts previously adopted compared to the potential amount for the modernization base grants.

RS Means (Gordian Group, Inc.) 3.56%			
Grade Level	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-25	<i>Potential Grant Per Pupil Effective 1-1-26</i>
Elementary	1859.78	\$6,034	\$6,249
Middle	1859.78	\$6,381	\$6,608
High	1859.78	\$8,356	\$8,653
Special Day Class – Severe	1859.78.3	\$19,232	\$19,917
Special Day Class – Non-Severe	1859.78.3	\$12,867	\$13,325

In addition, the CCI adjustment would increase the threshold amount for Government Code Section 66452.6(a)(2) for the period of one year commencing March 1, 2026. The following chart shows the amount previously adopted for 2025 compared to the resulting threshold amount, upon approval of the proposed 2026 CCI adjustment.

RS Means (Gordian Group, Inc.) 3.56%		
	Effective 3-1-2025	Potential 3-1-2026
Resulting Amount	\$399,010	\$413,215

RECOMMENDATION

Adopt the increase of 3.56 percent for the 2026 SFP grants based on the RS Means (The Gordian Group, Inc.) Construction Cost Index as shown in Attachment B.



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
1600 PACIFIC HIGHWAY, ROOM 402, SAN DIEGO, CALIFORNIA 92101-2422
(619) 531-5600

RYAN SHARP
ASSISTANT CLERK

ANN MOORE
ASSISTANT CLERK

May 11, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

Attached for your information is a letter from Kathleen Hayden, manager of Coyote Canyon Caballos d'Anza, proposing a joint memorandum of understanding that would integrate heritage horse rewilding into regional fire-management and habitat-restoration efforts.

Respectfully,


ANDREW POTTER

Attachment

cc: Ebony N. Shelton, Chief Administrative Officer
Dahvia Lynch, Deputy Chief Administrative Officer, Land Use and Environment Group
Board of Supervisors Communications Received

AJP: jse

From: kats27735@gmail.com
To: [FGG, Public Comment](#); cob@rivco.org; [Supervisor Joel Anderson District 2](#)
Subject: [External] Joint Proposal: MOU for Heritage Equine Management & Regional Fire Suppression (San Diego & Riverside Counties)
Date: Monday, May 11, 2026 2:08:39 PM

To the Honorable Members of the Boards of Supervisors for San Diego and Riverside Counties,

Subject: Joint Proposal for a Memorandum of Understanding (MOU) – Heritage Equine Management & Wildfire Mitigation

This letter serves as a formal proposal for a joint Memorandum of Understanding (MOU) between our respective Counties, the Coyote Canyon Caballos d’Anza 501(c)(3), and relevant stakeholders to integrate heritage horse rewilding as a "Best Management Practice" (BMP) for regional fire suppression and habitat management.

The regional threat of wildfire does not respect county lines, and neither does the historic grazing range of the California heritage horse. We believe a collaborative approach within the Multiple Species Conservation Program (MSCP) framework offers the most robust solution for managing our shared "outback" landscapes.

Strategic Objectives of the MOU:

1. Fire Risk Reduction: Establishing a pilot program for targeted, non-ruminant grazing in high-risk "fuel load" areas that are inaccessible to traditional machinery.
2. Resource Protection: Utilizing the rare 1769 Portolá bloodlines (verified by Texas A&M) to restore the biological and cultural integrity of our preserves.
3. Administrative Efficiency: Creating a unified management roadmap that reduces individual county oversight costs while maximizing ecological benefits across the regional MSCP network.

This proposal mirrors the collaborative "roadmap" currently being explored for other native species, such as the efforts led by the [California Grizzly Alliance](<https://patch.com/california/ramona/s/k9uns/effort-to-bring-grizzly-bears-back-to-ca-draws-backlash>), focusing on restorative justice and science-based land management.

We propose a joint session to draft the terms of this MOU, ensuring that San Diego and Riverside Counties lead the state in innovative, culturally significant stewardship.

Respectfully,

Kathleen Hayden
Manager, Coyote Canyon Caballos d’Anza



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
1600 PACIFIC HIGHWAY, ROOM 402, SAN DIEGO, CALIFORNIA 92101-2422
(619) 531-5600

RYAN SHARP
ASSISTANT CLERK

ANN MOORE
ASSISTANT CLERK

May 11, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

Attached, for your information, is correspondence from Kristin Brownell, regarding their support for expanded County investment into the Mas Fresco! Plus program.

Respectfully,


ANDREW POTTER

Attachment

cc: Ebony N. Shelton, Chief Administrative Officer
Board of Supervisors Communications Received

AJP: jse

May 6, 2026
San Diego County Board of Supervisors
1600 Pacific Highway
San Diego, CA 92101

Dear Chair Terra Lawson-Remer and Members of the San Diego County Board of Supervisors:

I am writing to express my strong support for continued and expanded County investment in the ¡Más Fresco! Plus program, and to respectfully urge the Board of Supervisors to allocate additional funding for the program in the FY 2026–27 County budget.

¡Más Fresco! Plus plays a vital role in improving access to healthy, fresh foods for individuals and families across San Diego County. By providing farm-fresh produce and nutrition incentives, the program helps address food insecurity while also promoting healthier eating habits and preventing chronic disease.

Beyond its impact on individual health, ¡Más Fresco! Plus strengthens local communities and supports the regional economy. By partnering with local farmers and community-based organizations, the program not only increases access to nutritious food but also contributes to a more resilient and equitable food system.

Programs like ¡Más Fresco! Plus are essential in addressing the root causes of health disparities. They provide practical, community-centered solutions that meet people where they are, while also advancing broader public health and equity goals.

I respectfully urge the County to continue investing in and expanding ¡Más Fresco! Plus so that more residents can benefit from its services. Sustained support will ensure the program can continue to improve health outcomes, reduce food insecurity, and strengthen communities throughout San Diego County.

San Diego County has already demonstrated strong leadership in supporting this innovative model. Additional investment now will help protect and expand one of the County's most effective and evidence-based food-as-medicine strategies.

Thank you for your leadership and for your continued commitment to the health of San Diego County residents.

Sincerely,



Kristin Brownell MD, MPH

{She/Her/Hers/Ella}

Faculty, Family Medicine Residency Program, FHCS
Core Faculty Member, Community Medicine Coordinator
San Diego Academy of Family Physicians Board Member, & Delegate
UCSD SOM Volunteer Clinical Faculty



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
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May 6, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

Attached, for your information, is correspondence from Rachel White, in regard to her concerns of the California Advisory Committee on Geographic Names (CACGN) and its proposed draft regulations establishing a, "Petition Process to Identify and Rename Offensive and Derogatory Geographic Features and Place Names."

Respectfully,


ANDREW POTTER

Attachment

cc: Ebony N. Shelton, Chief Administrative Officer
Board of Supervisors Communications Received

AJP: jse

From: [Rachel White](#)
To: [CA Advisory Committee on Geographic Names](#); [BGNEEXEC, GS-N-MAC](#); [exsec@ios.doi.gov](#)
Cc: [wade.crowfoot@resources.ca.gov](#); [Thompson, Geneva@CNRA](#); [Zahniser, Shellie R](#); [thompson.casework@mail.house.gov](#); [Brad Rasmussen](#); [Jessica Pyska](#); [support@savekelseyville.com](#)
Subject: [External] Open Letter to the California Advisory Committee on Geographic Names Regarding Draft Petition Regulations
Date: Friday, April 24, 2026 9:07:11 AM
Attachments: [6March2026CACGNDraftReqs.pdf](#)
[Measure U Results.pdf](#)

To the California Advisory Committee on Geographic Names (CACGN),
Members of County Boards of Supervisors Across California,
And Interested Members of the Public:

I write to express serious concern regarding CACGN's proposed draft regulations establishing a "Petition Process to Identify and Rename Offensive and Derogatory Geographic Features and Place Names."

While respectful public dialogue regarding geographic names is appropriate, the current proposal raises troubling questions about fairness, transparency, local self-governance, and the treatment of small communities throughout California.

The Kelseyville Example: Why This Matters Statewide

The community of **Kelseyville, California**, has become a central example of why these proposed regulations deserve close scrutiny.

Since a renaming submission was made in October 2023, residents have consistently argued that there is **no clear historical evidence establishing that Kelseyville was formally named in honor of any specific historical figure**. Instead, the proposed renaming effort has relied heavily on a *perceived association* rather than definitive proof.

Residents have repeatedly requested an opportunity for a full and fair hearing of these concerns. To date, CACGN has not meaningfully addressed the community's objections or publicly resolved the underlying factual dispute.

In 2024, Kelseyville (Lake County) voters considered **Advisory Ballot Measure U**, in which more than 70% of participating voters opposed a name change. Regardless of one's position on the issue, this demonstrated clear and substantial local sentiment that should not be dismissed.

Concerns Regarding Process and Governance

While this controversy has continued, CACGN has undergone leadership and voting-member changes and is now proposing new regulatory language that appears to expand the standards to include "perceived association."

This sequence of events has created a damaging public perception that rules and committee composition are being altered during an active

dispute in a manner that appears designed to secure a predetermined outcome rather than ensure a fair and impartial process.

I also want to note that **requests under the California Public Records Act** seeking records related to *leadership changes, membership changes, and decision-making processes* **have gone unanswered for more than a year.** As a result, legal assistance may now be required simply to obtain records that should be available through ordinary public transparency processes.

Forcing citizens to seek legal remedies in order to access basic public records further undermines confidence in public institutions and damages trust in the fairness of the process.

Why Counties (Everyone) Should Be Concerned

This issue reaches far beyond one town.

If a state body can revise standards, alter governance structures, and override clear local sentiment in one small community, then every county and every historically named town, road, business, hospital system, professional football team, or university in California could face similar uncertainty.

Many California communities, institutions, and landmarks bear names connected to historical figures whose legacies are complex or contested. If standards are vague, inconsistently applied, or based solely on perceived association, the scope of future disputes becomes limitless.

County governments should be deeply concerned about:

- Erosion of local control
- Unclear and subjective naming standards
- Administrative burdens and costs of renaming efforts
- Precedent affecting other communities statewide
- Reduced public trust caused by opaque decision-making

A Request to Boards of Supervisors Across California

I urge county Boards of Supervisors throughout California to review CACGN's draft regulations carefully and consider submitting formal comments requesting:

1. Clear and objective evidentiary standards
2. Strong protections for local voter input and local government authority
3. Full transparency regarding committee membership and governance changes
4. Consistent due process for affected communities
5. Narrowly tailored rules that prevent arbitrary or politically selective enforcement

A Request to CACGN and the U.S. Board on Geographic Names

I respectfully ask CACGN and the U.S. Board on Geographic Names to pause adoption of any expanded petition process until confidence in fairness and transparency is restored.

Public trust is earned through openness, consistency, and equal treatment, not through processes that appear predetermined or insulated from public accountability.

Closing

This is not merely about one town. It is about whether California's smallest communities will receive the same fairness, dignity, and voice afforded to larger institutions and more politically powerful interests.

I urge local governments and the public to engage now before these draft regulations are finalized.

Sincerely,

Rachel White

[Redacted signature]

[Redacted contact information]

CALIFORNIA NATURAL RESOURCES AGENCY
TITLE: PETITION PROCESS FOR
RENAMING OFFENSIVE AND
DERROGATORY PUBLIC
GEOGRAPHIC FEATURES OR PLACE NAMES
NAMES
DIVISION
CHAPTER

DRAFT TEXT OF PROPOSED REGULATIONS

Article 1. General Provisions

§ 1000. Applicability and Scope.

This chapter shall be known as the California Natural Resources Agency’s (Agency) Petition Process for Renaming Offensive and Derogatory Public Geographic Features or Place Names. These regulations apply to all petitions made to the Agency’s California Advisory Committee on Geographic Names (CACGN) for purposes of seeking review and possible public name change pursuant to Chapter 17 (commencing with § 8899.90) to Division 1 of Title 2 of the Government Code.

Note: Authority cited: Sections 8899.90, Government Code. Reference: Sections 8899.90, 8899.94 (a).

§ 1001. Definitions

The following definitions shall apply for the purposes of this Chapter:

(a) “California Advisory Committee on Geographic Names” or “CACGN” or “Advisory Committee” or “Committee” means the working group of state employees established within the California Natural Resources Agency through appointment by the Secretary of Natural Resources for purposes of providing advice and recommendation on public Geographic Features or Place Names located in California.

(b) “California Native American Tribe” means tribes located in California which are either recognized by the federal government pursuant to the annual list published under the Federally Recognized Indian Tribe List Act of 1994 (25 U.S.C. Sec. 5131) in the Federal Register or non-federally recognized.

- (c) “California Natural Resources Agency” means the cabinet level agency established pursuant to Government Code sections 12800 and 12805.
- (d) “Geographic Feature” means any location or publicly owned structure in California, including, but not limited to, navigable waters of the state, geographic features, parks, state or local roads, bridges, and publicly owned buildings.
- (e) “Notice of Determination” means a document stating the rejection or acceptance of a Petition for a Geographic Feature or Place Name.
- (f) “Notice of Receipt of Petition” means a document stating the Agency has received a Petition.
- (g) “Offensive and Derogatory” means:
- (1) Names with slurs or insults towards any classification of person identified in in Civil Code Section 51, or that perpetuate stereotypes or other pejorative ideology.
 - (2) Names that represent expressions of prejudice towards any class of person identified in Civil Code Section 51.
 - (3) Names honoring or with association or perceived association to specific people, past or present, who: Perpetuated or committed violence including but not limited to, rape, murder, genocide, forced relocation, internment, or human trafficking against any classification of person identified in in Civil Code Section 51.
- (h) “Petitioner” means a person or entity identified in Section 1002(a) who submits a Petition to rename an Offensive and Derogatory Geographic Feature or Place Name.
- (i) “Park” means any publicly owned or managed land primarily undeveloped and intended, at least in part, to preserve natural, scenic, or historic resources or to provide public recreational opportunities.
- (j) “Place” means any natural geographic feature or street, alley, or other road within the jurisdiction of the state or political subdivision of the state.
- (k) “Public Agency” means a California state agency, local governing body, and any other political subdivision of the State of California that has direct jurisdiction over or ownership of the Geographic Feature or Place Name.
- (l) “Secretary” means the Secretary of the Natural Resources Agency consistent with Public Resources Code sections 12800 and 12805.
- (m) “Supporting documentation” means sources in literature, web links, or news articles that

can be verified by third parties as to their accuracy or completeness.

Note: Authority cited: 8899.91, Government Code. Reference: Sections 8899.91, Government Code. Reference: Section 51, Civil Code, Section 12926(i),(s), Government Code.

Article 2. Petition Process

§ 1002. Geographic Features or Place Names Subject to Petition.

(a) The following persons or entities may Petition to identify an Offensive and Derogatory Geographic Feature or Place Name:

- (1) California Native American tribes;
- (2) Public Agencies;
- (3) Natural persons who can establish residency in California at the time of filing a Petition, or natural persons who live outside of California at the time of filing a Petition, but who can demonstrate a personal or legal impact has occurred or will occur as the result of an Offensive or Derogatory name. A personal or legal impact that could result from an Offensive or Derogatory name include, but are not limited to, having or anticipating having a legal residence in a Place with an Offensive or Derogatory mailing address, owning a business or subsidiary with an Offensive or Derogatory mailing address, burying a relative in a District with an Offensive or Derogatory name, or having relatives who have lived in a Place with an Offensive or Derogatory Name;
- (4) Legal entities, such as corporations, trusts, and other non-natural persons who have filed a tax return with the California State Franchise Tax Board in the year proceeding the Petition;
- (5) Voting member of the Committee during their tenure on the Committee.

(b) Only public Geographic Features or Place Names within the jurisdiction of a Public Agency may be the subject of a Petition consistent with Government Code § 8899.94

(b)(2).

Note: Authority cited: Section 1(c), Government Code. Reference: Sections 8899.91 (b), Government Code.

§ 1003. Required Contents of a Petition.

(a) All Petitions to identify an Offensive and Derogatory Geographic Feature or Place Name shall include:

- (1) Name and contact information of the Petitioner.
 - i. Contact information shall include an electronic mail address and phone number.
 - ii. An electronic mail that is returned or an electronic mail address not functioning may delay the processing of the petition or may result in denial of the petition.
- (2) The current name of the Geographic Feature or Place Name being proposed as Offensive and Derogatory.
- (3) Location of the Geographic Feature or Place Name, including a map and the latitude and longitude that clearly identifies the location of the Geographic Feature or Place.
- (4) A list of all Public Agencies with jurisdiction over the Geographic Feature or Place Name if known to Petitioner, or if unknown a statement identifying that Petitioner is not aware of the public entities with specific jurisdiction.
- (5) Relevant history of the Geographic Feature or Place Name, including citations and supporting documentation of the relevant history. Relevant history may include history of the origin of the current name, meaning of the name, how long the name has been in use, and the historical significance of the name.
- (6) Self-attestation under penalty of perjury that the Petitioner meets the requirements under Section 1002 (a).
- (7) Justification why the Geographic Feature or Place Name is Offensive and Derogatory as defined in Section 1001.
- (8) Engagement that has been done to date by the Petitioner with potentially affected Public Agencies, entities, tribes and members of the public.

(9) Other narrative explanation from Petitioner about the basis of the Petition.

(b) All submitted documentation shall be legible.

Note: Authority cited: Sections 8899.90 (b), Government Code. Reference: Sections 8899.94 (a)(2), Government Code.

§ 1004. Submission of a Petition.

(a) Petitioners shall provide all information requested in Section 1003 for the Petition to be considered complete. Failure to provide the information may delay the processing of the Petition or may result in denial of the Petition.

(b) Petitions shall be submitted electronically to the Committee as indicated on the California Natural Resources Agency's website.

(c) A Notice of Receipt of the Petition will be sent to the Petitioner through the contact information provided in the Petition.

Note: Authority cited: Sections 8899.90 (b), Government Code. Reference: Sections 8899.94 (a)(2), Government Code.

§ 1005. Committee Staff Petition Evaluation.

(a) A Petition may be rejected on the following bases, including but not limited to:

(1) Illegible documentation.

(2) Required information as stated in Section 1003 has not been provided.

(3) Invalid email address or contact information.

(4) Petition requests the Committee change the names of private places or private geographic features, including but not limited to private roads, private businesses, or private signs not under any Public Agency jurisdiction.

(5) Petition requests the Committee change the names of Geographic Features or Place Names solely within the authority of the federal government.

(b) Committee staff will notify the Petitioner through electronic mail if a Petition is incomplete or if there are any deficiencies in the Petition or information provided.

(1) The Petitioner shall provide the requested corrections and additional information to Committee staff within 30 calendar days of the notification, or the Petition may be rejected.

- (c) Committee staff or Committee members shall conduct tribal consultations regarding all completed Petitions as consistent with the Agency's Tribal Consultation Policy.
- (d) Committee staff or Committee members shall consult with the responsible and affected Public Agencies on completed Petitions.
- (e) After completing consultations, Committee staff will send its recommendation and information on how to participate in the public CACGN meeting where the Committee will review the Petition to the Petitioner, potentially effected California Native American tribes, and the Responsible Public Agency.

Note: Authority cited: Sections 8899.90 (b), Government Code. Reference: Sections 8899.94 (a)(2), Government Code.

§ 1006. Committee Consideration of Petitions

- (a) Committee staff shall present a list of completed Petitions to the Committee during a public meeting.
- (b) The Committee shall consider the following criteria to determine approval or disapproval of a Petition:
 - (1) The Geographic Feature or Place Name meets the definition of Offensive and Derogatory as stated in Section 1001.
 - (2) Petition meets the standards for accepted Petitions as stated in Sections 1002, 1003 and 1004 of these regulations.
- (c) After hearing from Committee staff, the Petitioner, the Responsible Public Agencies, California Native American tribes, and the public, the Committee shall make a finding as to whether a reasonable person would find the Geographic Feature or Place Name Offensive and Derogatory. If a majority of the Committee finds that the Geographic Feature or Place Name is Offensive and Derogatory, it shall proceed to subpart (d) of this Section. If a majority of the Committee do not find that the Geographic Feature or Place Name is Offensive and Derogatory, the Committee shall reject the Petition.
- (d) The Committee or Committee staff shall subsequently transmit the results of the Committee vote, finding a Geographic Feature or Place Name to be Offensive and Derogatory, to the Secretary of the Natural Resources Agency. The Secretary shall have 30 days to concur with the

Committee or independently reject the Petition. If the Secretary takes no action after 30 days, the Petition shall be deemed accepted.

- (e) Upon the Committee’s vote and Secretary’s approval of a determination of a Geographic Feature or Place Name as Offensive and Derogatory, Committee staff shall send to the Petitioner and Responsible Public Agency a Notice of Determination.

Note: Authority cited: Section 8899.90, Government Code. Reference: Sections Section 8899.90, Government Code.

Article 3. Identification of Same or Similar Determined Offensive and Derogatory Names

§ 1007. Process for Identifying Same or Similar Determined Offensive and Derogatory Names

- (a) Geographic Features or Place Names identified and approved as Offensive and Derogatory through the Petition process identified in Sections 1002 through 1006 above shall be considered for potential duplicity throughout the State.
- (b) The Committee shall solicit input from members of the public, California Native American tribes, and Public Agencies regarding other same or similar names located in California and under Public Agency jurisdiction for a period of 120 calendar days.
- (1) Submittals for same or similar Offensive and Derogatory Geographic Features or Place Names must come from a person or entity as consistent with Section 1002.
- (2) Submittals for same or similar Offensive and Derogatory Geographic Features or Place Names must also include the same information required in Section 1003(a)(1)-(4) and shall be submitted using the same means as those identified in Section 1004.
- (c) Upon receipt of a submittal for a same or similar Offensive and Derogatory Geographic Feature or Place Name, Committee staff shall send a notice of receipt.
- (d) After the 120 calendar day solicitation period has passed, Committee staff shall notify and coordinate with Responsible Public Agencies to identify and approve replacement names following the process as stated in Article 4.

Article 4. Process for Identifying and Approving Replacement Names

§ 1008. Identifying Replacement Names for Approved Offensive and Derogatory Geographic Features or Place Names

(a) Committee staff or Committee members shall conduct tribal consultations regarding all approved Petitions as consistent with the Agency’s Tribal Consultation Policy. Committee staff or Committee members shall notify and coordinate with Responsible Public Agencies as well as potentially affected state agencies to identify replacement names for approved Offensive and Derogatory Geographic Features or Place Names.

(1) Upon such notice, the Responsible Public Agency shall propose at least one replacement name to the Committee within 180 calendar days of receiving the Notice of Determination by the Committee.

- i. Replacement names shall adhere to the criteria identified in Section 1009.
- ii. The responsible Public Agency shall consult with potentially effected California Native American tribes to solicit replacement name proposals.
- iii. The responsible Public Agency shall provide guidance on pronunciation and meaning of proposed replacement names.

(2) If replacement names are not provided by the Public Agency within the 180 calendar days, or the replacement names are deemed to be Offensive and Derogatory by the Committee using the criteria listed in Section 1001 (g), the Committee shall solicit replacement names and input from the following:

- i. California Native American tribes,
- ii. Appropriate Public Agencies, and
- iii. Members of the public.

(b) The Committee shall review and approve or reject replacement names in accordance with the criteria stated in §1009.

(c) The Committee shall provide an opportunity for the public to provide comments during a public meeting for which replacement names for the Offensive and Derogatory Geographic Feature or Place Name are being considered.

- (d) After review and public comment, the Committee shall vote on a recommendation of proposed replacement names. The Committee or Committee staff shall subsequently transmit the results of the Committee vote, recommending one or more replacement names, to the Secretary of the Natural Resources Agency. The Secretary shall have 30 days to concur with the Committee or independently reject the recommended replacement names. If the Secretary takes no action after 30 days, the replacement name(s) shall be deemed accepted.
- (e) Upon the Committee's vote and Secretary's approval of a replacement name for an Offensive and Derogatory Geographic Feature or Place Name, the Committee or Committee staff shall notify the Responsible Public Agency.
- (f) The Responsible Public Agency shall formally adopt an approved replacement name within 365 days of Committee communication of the decision in Section 1008(f).
- (1) Extensions may be granted by the Committee upon request for reasonable cause. Reasonable cause may include, but is not limited to, natural disasters, established name change processes that require longer periods, or other causes outside a Responsible Public Agency's control.
- (g) Responsible Public Agencies shall coordinate with emergency response, mapping entities, and any additional departmental entities, as appropriate, to reflect the approved name changes in maps, signs, interpretive markers, and databases where the Geographic Feature or Place Name is recorded.
- (1) Additional information on coordinating with the entities mentioned in section 1008(h) is available on the California Natural Resources Agency's website.

Note: Authority cited: Section 8899.90 (b), Government Code. Reference: Sections Section 8899.94, Government Code.

§ 1009. Criteria for Approving a Replacement Name

- (a) When selecting replacement names, the Committee shall prioritize:
- (1) Names that do not refer to a specific person.
- (2) Names that honor and recognize California Native American tribes, tribal culture, and indigenous languages specific to the geographic region in question, including place names that were previously used by California Native American tribes.

(b) The Committee shall consider input received from California Native American tribes, Public Agencies, and affected members of the public.

(c) The replacement name shall not be Offensive or Derogatory as stated in Section 1001.

Note: Authority cited: Section 8899.94, Government Code. Reference: Sections Section 8899.94, Government Code.

§ 1010. Public Name Changes Independent of Petition Process

(a) Nothing in this Division is intended to prevent Public Agencies from independently adopting, modifying, or changing Geographic Features or Place Names under their jurisdiction that are consistent with existing law as well as the regulations in this Article.

Note: Authority cited: Section 8899.94, Government Code. Reference: Sections Section 8899.94, Government Code.

§ 1011. Committee Record, Findings, and Decision

(a) Once the Committee and Secretary have made a decision to reject or accept a Petition or replacement name, no further deliberations are needed by the Committee on the Geographic Features or Place Names in question.

(b) Final decisions on replacement names shall be recorded and made available to the public.

Note: Authority cited: Section 8899.95, Government Code. Reference: Sections Section 8899.95, Government Code.

§ 1012. Appeals to the Secretary

(a) Petitioners can appeal rejected Petitions and all recommended replacement names to the Secretary.

(b) The Committee has the discretion to determine if a rejected Petition should be reviewed again for completeness.

Note: Authority cited: Section 8899.94, Government Code. Reference: Sections Section 8899.94, Government Code.

Article 5. Public Comment

§ 1013. Right to Comment.

(a) Any persons or entities stated in Section 1002(a) may submit written or oral comments relevant to a proposed Petition or renaming proposal to the Agency.

Note: Authority cited: Section 8899.92, Government Code. Reference: Sections Section 8899.94 (2), Government Code.

Article 6. Remedies and Enforcement

§ 1014.

(a) Once a Public Geographic Feature or Place Name has been deemed Offensive and Derogatory by the Committee and approved by the Secretary of the Natural Resources Agency, a Public Agency shall no longer replace any sign, interpretative marker, or any other marker or printed material with the discontinued name.

(b) The Committee shall issue a notice of non-compliance for any failure by a Responsible Public Agency to replace a newly instated signs, markers, or other public insignia within 90 days of receiving a notice for non-compliance. The Committee shall seek any remedy and take any enforcement action available to it by law for any of the following, including, but not limited to:

- a. Failure of a Responsible Public Agency to comply with a final name-change decision falling under these regulations, or
- b. Maintenance of signs or other markers in contravention of a final name change decision or maintenance of signs or markers that otherwise retain an Offensive and Derogatory name in a space over which a Public Agency has direct jurisdiction or ownership.

Note: Authority cited: Section 1, and 8899.93, Government Code. Reference: Sections Section 8899.93 (a), Government Code.

Advisory Measure U - “Shall the Board of Supervisors recommend approval of the proposal to change the name of the town of “Kelseyville” to “Konocti”?”

17,934 No Votes

70.58% of Voters with a 71.52% Voter turnout Countywide

County of Lake Advisory Measure U							
Precincts			Voters				
Counted	Total	Percent	Ballots	Registered	Percent		
48	48	100.00%	27,127	37,929	71.52%		

Choice	Party	Vote by Mail		Election Day Voting		Total	
YES		6,493	29.37%	981	29.75%	7,474	29.42%
NO		15,618	70.63%	2,316	70.25%	17,934	70.58%
Cast Votes:		22,111	100.00%	3,297	100.00%	25,408	100.00%
Undervotes:		1,433		277		1,710	
Overvotes:		6		3		9	
Unqualified write-ins:		0		0		0	

District 5 - 4,019 No Votes

District 4 - 3,600 No Votes

Kelseyville Area Vote by Precinct

	% Turnout	Yes	No		
Lands End, Adobe Creek	70	157	473	630	75.1%
Lakeside Park	83	9	65	74	87.8%
Soda Bay	67	52	133	185	71.9%
Highland Springs	72	5	17	22	77.3%
Gaddy	64	11	47	58	81.0%
Heights, Little Borax	82	256	671	927	72.4%
Kelseyville, Cole Creek	73	287	1329	1616	82.2%
Wheeler Point, Hawaiiina	81	182	574	756	75.9%
Riviera	71	296	865	1161	74.5%
Hobergs, Mtn	77	300	482	782	61.6%
		1555	4656	6211	75.0%

Article 1:
General
Provisions

§ 1000.
Applicability
and Scope

§ 1001.
Definitions

§ 1001(g)

“Offensive and Derogatory”

- (1) Names with slurs or insults towards any classification of person identified in Civil Code Section 51, or that perpetuate stereotypes or other pejorative ideology.
- (2) Names that represent expressions of prejudice towards any class of person identified in Civil Code Section 51.
- (3) Names honoring or with association or perceived association to specific people, past or present, who: Perpetuated or committed violence including but not limited to, rape, murder, genocide, forced relocation, internment, or human trafficking against any classification of person identified in Civil Code Section 51.



ANDREW POTTER, CCB
EXECUTIVE OFFICER/CLERK

CLERK OF THE BOARD OF SUPERVISORS
1600 PACIFIC HIGHWAY, ROOM 402, SAN DIEGO, CALIFORNIA 92101-2422
(619) 531-5600

RYAN SHARP
ASSISTANT CLERK

ANN MOORE
ASSISTANT CLERK

May 4, 2026

TO: Supervisor Terra Lawson-Remer, Chair
Supervisor Monica Montgomery Steppe, Vice-Chair
Supervisor Paloma Aguirre, Chair Pro Tem
Supervisor Joel Anderson
Supervisor Jim Desmond

FROM: Andrew Potter
Clerk of the Board of Supervisors

REFERRAL

The attached reports/letters are from the County's external auditors, Eide Bailly, reporting on their audit of the County's financial statements according to generally accepted auditing standards (GAAS).

Respectfully,


ANDREW POTTER

Attachments

cc: Ebony N. Shelton, Chief Administrative Officer
Joan Bracci, Chief Financial Officer
Tracy Drager, Auditor and Controller
Board of Supervisors Communications Received

AJP:jse



March 24, 2026

To the Audit Committee,
Board of Supervisors, and
Tracy Drager, Auditor and Controller
County of San Diego
San Diego, California

We have audited the financial statements of the County of San Diego, California (County), as of and for the year ended June 30, 2025, and have issued our report thereon dated November 14, 2025.

We did not audit the financial statements of the First 5 Commission of San Diego (First 5) and the San Diego County Employees Retirement Association (SDCERA). Those financial statements were audited by other auditors as stated in our report on the County's financial statements. This communication does not include the results of those audits.

We have previously provided our communication in accordance with professional standards on the audit of the financial statements in our letter dated November 14, 2025. Professional standards require that we advise you of the following matters relating to our audit of compliance under the Uniform Guidance.

Our Responsibility in Relation to the Financial Statement Audit under Generally Accepted Auditing Standards and *Government Auditing Standards* and our Compliance Audit under the Uniform Guidance

As communicated in our letter dated September 19, 2025, our responsibility, as described by professional standards, is to form and express an opinion about whether the financial statements that have been prepared by management with your oversight are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America and to express an opinion on whether the County complied with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of the County's major federal programs. Our audit of the financial statements and major program compliance does not relieve you or management of its respective responsibilities.

Our responsibility, as prescribed by professional standards as it relates to the audit of the County's major federal program compliance, is to express an opinion on the compliance for each of the County's major federal programs based on our audit of the types of compliance requirements referred to above. An audit of major program compliance includes consideration of internal control over compliance with the types of compliance requirements referred to above as a basis for designing audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, as a part of our major program compliance audit, we considered internal control over compliance for these purposes and not to provide any assurance on the effectiveness of the County's internal control over compliance.

We are also responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

We have provided our comments regarding internal controls during our audit in our Reissued Independent Auditor's Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards* dated November 14, 2025, except for finding 2025-001 SEFA Preparation, which is dated March 24, 2026.

We have also provided our comments regarding compliance with the types of compliance requirements referred to above and internal controls over compliance during our audit in our Independent Auditor's Report on Compliance with Each Major Federal Program and Report on Internal Control Over Compliance Required by the Uniform Guidance dated March 24, 2026.

Planned Scope and Timing of the Audit

We conducted our audit consistent with the planned scope and timing we previously communicated to you.

Compliance with All Ethics Requirements Regarding Independence

The engagement team, others in our firm, as appropriate, our firm, and other firms utilized in the engagement, if applicable, have complied with all relevant ethical requirements regarding independence.

Qualitative Aspects of the Entity's Significant Accounting Practices

Significant Accounting Policies

Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted by the County as it relates to the Single Audit are included in notes to the Schedule of Expenditures of Federal Awards (SEFA). There have been no initial selection of accounting policies and no changes in significant accounting policies as it relates to the Single Audit. No matters have come to our attention that would require us, under professional standards, to inform you about (1) the methods used to account for significant unusual transactions and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

Accounting Estimates and Related Disclosures

Accounting estimates and related disclosures are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments.

The most sensitive accounting estimates were disclosed in our letter dated November 14, 2025, and there are no changes as of March 24, 2026.

Financial Statement Disclosures

Certain financial statement disclosures involve significant judgment and are particularly sensitive because of their significance to financial statement users. The most sensitive disclosures affecting the County's financial statements were disclosed in our letter dated November 14, 2025, and there are no changes as of March 24, 2026.

Significant Difficulties Encountered during the Audit

We encountered no significant difficulties in dealing with management relating to the performance of the audit.

Uncorrected and Corrected Misstatements

For purposes of this communication, professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that we believe are trivial, and communicate them to the appropriate level of management. Further, professional standards require us to also communicate the effect of uncorrected misstatements related to prior periods on the relevant classes of transactions, account balances or disclosures, and the financial statements as a whole. We previously communicated such items in our letter dated November 14, 2025. There are no changes as of March 24, 2026 except for the following:

The following misstatements that we identified as a result of our audit procedures were brought to the attention of, and corrected by, management: An adjustment to the SEFA was made to reduce the current year federal expenditures for ALN 97.036 in the amount of \$24.8 million.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the financial statements or the auditor's report. No such disagreements arose during the course of the audit.

Circumstances that Affect the Form and Content of the Auditor's Report

For purposes of this letter, professional standards require that we communicate any circumstances that affect the form and content of our auditor's report.

Our Independent Auditor's Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards* was reissued to include finding 2025-001 SEFA Preparation, which was identified during our procedures related to the Schedule of Expenditures of Federal Awards and single audit.

Representations Requested from Management

We have requested certain written representations from management on the audit of compliance under the Uniform Guidance which are included in the management representation letter dated March 24, 2026.

Management's Consultations with Other Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters. Management informed us that, and to our knowledge, there were no consultations with other accountants regarding auditing and accounting matters.

Other Significant Matters, Findings, or Issues

In the normal course of our professional association with the County, we generally discuss a variety of matters, including the application of accounting principles and auditing standards, significant events or transactions that occurred during the year, operating conditions affecting the entity, and operating plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as County's auditors.

Other Information Included in Annual Reports

Pursuant to professional standards, our responsibility as auditors for other information, whether financial or nonfinancial, included in County's audited financial statements, does not extend beyond the financial information identified in the audit report, and we are not required to perform any procedures to corroborate such other information.

However, in accordance with such standards, we will review the information inputted into the data collection form and will consider whether such information, or the manner of its presentation, is materially consistent with the financial statements.

This report is intended solely for the information and use of the Audit Committee, Board of Supervisors, and management of the County and is not intended to be, and should not be, used by anyone other than these specified parties.

Respectfully,

A handwritten signature in black ink that reads "Eide Bailly LLP". The signature is written in a cursive, flowing style.

Ontario, California

Federal Awards Reports in Accordance
with the Uniform Guidance
June 30, 2025

County of San Diego, California



Independent Auditor’s Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with <i>Government Auditing Standards</i> (Reissued).....	1
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Independent Auditor's Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards* (Reissued)

To the Board of Supervisors
County of San Diego, California

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States (*Government Auditing Standards*), the financial statements of the governmental activities, the business-type activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the County of San Diego, California (County), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the County's basic financial statements and have issued our report thereon dated November 14, 2025. Our report includes a reference to other auditors who audited the financial statements of the First 5 Commission of San Diego and the San Diego County Employees Retirement Association, as described in our report on the County's financial statements. This report does not include the results of the other auditors' testing of internal control over financial reporting or compliance and other matters that are reported on separately by those auditors. Our report also included an emphasis of matter paragraph regarding the adoption of GASB Statement No. 101, *Compensated Absences*, for the year ended June 30, 2025.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered the County's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the County's internal control. Accordingly, we do not express an opinion on the effectiveness of the County's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the County's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that were not identified. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. We identified a deficiency in internal control, described in the accompanying Schedule of Findings and Questioned Costs as item 2025-001 that we consider to be a significant deficiency.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the County’s financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Other Matter – Reissuance of Report

This report on internal control over financial reporting and the report on compliance and other matters replaces our previously issued report dated November 14, 2025. The Schedule of Findings and Questioned costs has been reissued to include finding 2025-001.

The County’s Response to Findings

Government Auditing Standards requires the auditor to perform limited procedures on the County’s response to the findings identified in our audit and described in the accompanying Schedule of Findings and Questioned Costs. The County’s response was not subjected to the other auditing procedures applied in the audit of the financial statements and, accordingly, we express no opinion on the response.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the result of that testing, and not to provide an opinion on the effectiveness of the County’s internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the County’s internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



Ontario, California
November 14, 2025, except for finding 2025-001 SEFA Preparation, which is dated March 24, 2026.



Independent Auditor's Report on Compliance for Each Major Federal Program; Report on Internal Control over Compliance; and Report on the Schedule of Expenditures of Federal Awards Required by the Uniform Guidance

To the Board of Supervisors
County of San Diego, California

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited the County of San Diego, California's (County) compliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* that could have a direct and material effect on each of the County's major federal programs for the year ended June 30, 2025. The County's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, the County complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2025.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the County and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the County's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the County's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the County's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the County's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the County's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the County's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the County's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control over Compliance

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance and therefore, material weaknesses or significant deficiencies may exist that were not identified. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, as discussed below, we did identify certain deficiencies in internal control over compliance that we consider to be significant deficiencies.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance. We consider the deficiency in internal control over compliance described in the accompanying schedule of findings and questioned costs as item 2025-002 to be a *significant deficiency*.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

Government Auditing Standards requires the auditor to perform limited procedures on the County's response to the internal control over compliance finding identified in our compliance audit described in the accompanying schedule of findings and questioned costs. The County's response was not subjected to the other auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Report on Schedule of Expenditures of Federal Awards Required by the Uniform Guidance

We have audited the financial statements of the governmental activities, the business-type activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the County as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the County's basic financial statements. We issued our report thereon dated November 14, 2025, which contained unmodified opinions on those financial statements. Our report included a reference to other auditors who audited the financial statements of the First 5 Commission of San Diego and the San Diego County Employees Retirement Association, as described in our report on the County's financial statements. Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the basic financial statements.

The accompanying schedule of expenditures of federal awards is presented for purposes of additional analysis as required by the Uniform Guidance and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the schedule of expenditures of federal awards is fairly stated in all material respects in relation to the basic financial statements as a whole.

Eide Bailly LLP

Ontario, California
March 24, 2026

County of San Diego, California
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
U.S. DEPARTMENT OF AGRICULTURE					
SNAP Cluster:					
State Administrative Matching Grants for the Supplemental Nutrition Assistance Program:					
Passed Through California Department of Aging					
Supplemental Nutrition Assistance Program-Education		10.561	CF-2223-23	\$ 1,155,542	\$ -
CalFresh Expansion		10.561	CF-2223-23	56,929	-
Subtotal				<u>1,212,471</u>	<u>-</u>
Passed Through California Department of Public Health					
Supplemental Nutrition Assistance Program-Education		10.561	23-10340	3,847,772	462,694
Subtotal				<u>3,847,772</u>	<u>462,694</u>
Passed Through California Department of Social Services					
CalFresh Employment and Training Administration		10.561	257CACA4Q7503	4,833,469	3,668,552
CalWORKs Information Network System		10.561	3764901	325,116	-
Non Assistance CalFresh Administration		10.561	257CACA4S2514	103,521,861	-
Subtotal				<u>108,680,446</u>	<u>3,668,552</u>
Total SNAP Cluster (10.561)				<u>113,740,689</u>	<u>4,131,246</u>
Child Nutrition Cluster:					
School Breakfast Program:					
Passed Through California Department of Education					
School Nutrition Breakfast Program		10.553	02403-SN-37-R	242,701	-
School Nutrition Breakfast Program		10.553	02406-SN-37-R	17,960	17,960
Subtotal - 10.553				<u>260,661</u>	<u>17,960</u>
National School Lunch Program:					
Passed Through California Department of Education					
National Nutrition Program - Lunch		10.555	02403-SN-37-R	388,588	-
National Nutrition Program - Snack		10.555	02403-SN-37-R	69,219	-
Polinsky National School Lunch		10.555	02406-SN-37-R	26,323	26,323
Subtotal - 10.555				<u>484,130</u>	<u>26,323</u>
Total Child Nutrition Cluster (10.553 & 10.555)				<u>744,791</u>	<u>44,283</u>
Plant and Animal Disease, Pest Control, and Animal Care:					
Passed Through California Department of Food and Agriculture					
Detection, Diagnostic and Quarantine		10.025	24-0314-007-SF	549,933	-
Detection, Diagnostic and Quarantine		10.025	24-0236-043-SF	549,322	-
Pest Detection		10.025	24-0132-032-SF	1,082,451	-
Pest Exclusion		10.025	23-0529-033-SF	1,233,197	-
Pest Exclusion		10.025	24-0450-003-SF	113,855	-
Subtotal - 10.025				<u>3,528,758</u>	<u>-</u>
Rural Rental Assistance Payments:					
Firebird Minor	D	10.427	04-037-592185452	254,416	-
Infrastructure Investment and Jobs Act Community Wildfire Defense Grants:					
Community Wildfire Defense Program	D	10.720	23-DG-11052012-459	1,054,519	-
Community Project Funds - Congressionally Directed Spending:					
Community Project Program	D	10.730	23-DG-11052012-151	419,967	-
TOTAL - U. S. DEPARTMENT OF AGRICULTURE				<u>119,743,140</u>	<u>4,175,529</u>
U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT					
Section 8 Project Based Cluster:					
Lower Income Housing Assistance Program Section 8 Moderate Rehabilitation:					
Housing Assistance Moderate Rehabilitation Project 4	D	14.856	CA108MR0004	618,843	-
Total Section 8 Project Based Cluster (14.856)				<u>618,843</u>	<u>-</u>
CDBG Cluster Entitlement/Special Purpose Grants:					
Community Development Block Grants/Entitlement Grants					
Community Development Block Grant	D	14.218	B21UC060501	852,639	19,267
Community Development Block Grant	D	14.218	B22UC060501	427,160	128,272
Community Development Block Grant	D	14.218	B23UC060501	523,706	344,065
Community Development Block Grant	D	14.218	B24UC060502	2,358,075	635,391
Community Development Block Grant	D	14.218	B25UC060501	24,062	-
Subtotal				<u>4,185,642</u>	<u>1,126,995</u>
COVID-19 Community Development Block Grants/Entitlement Grants:					
COVID-19 Community Development Block Grant	D	14.218	B20UW060501	177,204	156,284
Total CDBG Cluster Entitlement/Special Purpose Grants (14.218)				<u>4,362,846</u>	<u>1,283,279</u>

County of San Diego, California
 Schedule of Expenditures of Federal Awards
 Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
Housing Voucher Cluster:					
Section 8 Housing Choice Vouchers:					
HCV Administration Fee Reserve	D	14.871	CA108V0	\$ 15,713,295	\$ -
HCV Administration Fee Reserve - EHV	D	14.871	CA108V0	228,787	-
Voucher Program Projects	D	14.871	CA108V0	225,643,835	-
Voucher Program Projects - EHV	D	14.871	CA108V0	5,766,107	-
Subtotal - 14.871				247,352,024	-
Mainstream Vouchers:					
Mainstream Vouchers	D	14.879	CA108DV	3,511,287	-
Total Housing Voucher Cluster (14.871 & 14.879)				250,863,311	-
Emergency Solutions Grant Program:					
Emergency Solutions Grant Program	D	14.231	E23UC060501	24,261	24,261
Emergency Solutions Grant Program	D	14.231	E24UC060501	322,345	294,477
Subtotal				346,606	318,738
Passed Through California State Housing and Community Development					
Emergency Solutions Grant Program	I	14.231	22-ESG-17006	52,786	52,786
Emergency Solutions Grant Program	I	14.231	23-ESG-17006	358,397	347,656
Subtotal				411,183	400,442
Subtotal - 14.231				757,789	719,180
HOME Investment Partnerships Program:					
HOME Investment Partnerships Program	D	14.239	M19DC060534	107,895	-
HOME Investment Partnerships Program	D	14.239	M20DC060534	1,628,768	-
HOME Investment Partnerships Program	D	14.239	M21DC060534	1,370,088	-
HOME Investment Partnerships Program	D	14.239	M22DC060534	274,727	-
HOME Investment Partnerships Program	D	14.239	M23DC060534	51,438	-
HOME Investment Partnerships Program	D	14.239	M24DC060535	287,045	-
COVID-19 HOME Investment Partnerships Program	D	14.239	M21DP060534	3,341,172	-
Subtotal - 14.239				7,061,133	-
Housing Opportunities for Persons with AIDS:					
Housing Opportunities for Persons with AIDS	D	14.241	CAH23F015	1,289,585	438,002
Housing Opportunities for Persons with AIDS	D	14.241	CAH24F015	5,852,528	3,979,177
Subtotal - 14.241				7,142,113	4,417,179
Resident Opportunity and Supportive Services - Service Coordinators:					
Resident Opportunity and Supportive Services	D	14.870	CA108RPS072A012	65,907	-
Public Housing Operating Fund:					
Public Housing Operating Fund	D	14.850	CA108-00000121D	429	-
Public Housing Operating Fund	D	14.850	CA108-00000124D	239,349	-
Public Housing Operating Fund	D	14.850	CA108-00000125D	86,867	-
Subtotal - 14.850				326,645	-
Public Housing Capital Fund:					
Public Housing Capital Fund	D	14.872	CA16P108501-20	226,876	-
Family Unification Program (FUP):					
Voucher Program Projects	D	14.880	CA108 HCV 2019 FUP NOFA	270,434	-
Family Self-Sufficiency Program:					
HCV Program Administration	D	14.896	CA108FSF	187,986	-
TOTAL - U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT				271,883,883	6,419,638
U.S. DEPARTMENT OF JUSTICE					
Child Exploitation Task Force (CETF)	D	16.U01	AGREEMENT	17,930	-
Cyber Crimes Task Force (CCTF)	D	16.U02	CYBER CRIME TF	1,047	-
Domestic Cannabis Eradication and Suppression (DCE/SP) 2024	D	16.U03	AGREEMENT 2024-34	215,794	-
Domestic Cannabis Eradication and Suppression (DCE/SP) 2025	D	16.U03	AGREEMENT 2025-34	189,537	-
Subtotal - 16.U03				405,331	-
Immigration and Customs Enforcement (ICE)	D	16.U04	MOU WITH IMMIGRATION	391,150	-
Joint Terrorism Task Force (JTTF)	D	16.U05	AGREEMENT	19,625	-
Narcotic Task Force (NTF) Drug Enforcement Agency (DEA)	D	16.U06	MOA-DEA	299,515	-

County of San Diego, California
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	MOA- OCDETF	\$ 46,520	\$ -
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0847	20,927	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0869	666	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0881	1,285	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0882H	1,750	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0886	1,666	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0892	4,856	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0895	666	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0925	2,142	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0935	476	-
Organized Crime Drug Enforcement Task Force (OCDETF)	D	16.U07	SW-CAS-0939	666	-
Subtotal - 16.U07				81,620	-
SAFE Streets - East County Regional Gang Task Force (ECRGTF)	D	16.U08	SSTF	48,207	-
SAFE Streets - North County Regional Gang Task Force (NCRGTF)	D	16.U08	SSTF	95,513	-
SAFE Streets - Violent Crimes Task Force (Bank Robbery)	D	16.U08	SSTF	4,964	-
SAFE Streets - Violent Crimes Task Force (Gang Group)	D	16.U08	SSTF	21,740	-
Subtotal - 16.U08				170,424	-
San Diego North County Elder Justice Task Force	D	16.U09	MOU	3,189	-
San Diego Transnational Organized Crime Task Force	D	16.U10	MOU	8,268	-
U.S Marshals Fugitive Task Force	D	16.U11	MOU-SDFTF	85,086	-
Comprehensive Forensic DNA Analysis Grant Program:					
Prosecuting Cold Cases Using DNA	D	16.036	15PBJA-23-GG-02267-DNAX	176,264	-
DNA Backlog Reduction Program	D	16.036	15PBJA-24-GG-02617-DNAX	521	-
Subtotal - 16.036				176,785	-
Enhanced Training and Services to End Violence and Abuse of Women Later in Life:					
OVW-End Abuse in Later Life	D	16.528	15JOVW-21-GK-00037-ALLX	99,641	-
Missing Children's Assistance:					
Passed Through City of San Diego					
Internet Crimes Against Children (ICAC)	I	16.543	2018-50778-CA-MC	49,788	-
Crime Victim Assistance:					
Passed Through California Governor's Office of Emergency Services					
Victims Assistance Program - Victims of Crime Act (VOCA)	I	16.575	VW23 42 0370	964,708	-
Victims Assistance Program - Victims of Crime Act (VOCA)	I	16.575	VW24 02 8101	1,054,267	-
Victim Services (XC) Program	I	16.575	XC23 06 0370	614,651	-
XC Victim Services Grant Priority B	I	16.575	XC23 06 0370	13	13
Subtotal - 16.575				2,633,639	13
Grants to Encourage Arrest Policies and Enforcement of Protection Orders Program:					
OVW-Improving Criminal Justice Response (ICJR)	D	16.590	15JOVW-21-GG-02008-ICJR	250,176	-
State Criminal Alien Assistance Program:					
State Criminal Alien Assistance Program	D	16.606	2019-AP-BX-1273/2020-0855	542,734	-
Edward Byrne Memorial Justice Assistance Grant Program:					
Passed Through Board of State and Community Corrections					
Pretrial Advocacy & Community Connections (PACC)	I	16.738	BSCC 1212-23	578,593	-
Passed Through City of Lemon Grove					
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-21-GG-01175-JAGX	1,469	-
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-22-GG-02933-JAGX	3,135	-
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-23-GG-03092-JAGX	4,119	-
Subtotal				8,723	-
Passed Through City of Vista					
Justice Assistance Block Grant (JAG)	I	16.738	2019-DJ-BX-0321	4,960	-
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-21-GG-01263-JAGX	1,974	-
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-22-GG-02455-JAGX	4,522	-
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-23-GG-03142-JAGX	22,346	-
Justice Assistance Block Grant (JAG)	I	16.738	15PBJA-24-GG-04756-JAGX	10,169	-
Subtotal				43,971	-
Subtotal - 16.738				631,287	-
DNA Backlog Reduction Program:					
DNA Backlog Reduction Program 2021	D	16.741	15PBJA-21-GG-03099-DNAX	170,000	-
DNA Backlog Reduction Program 2022	D	16.741	15PBJA-22-GG-01616-DNAX	370,351	-
DNA Backlog Reduction Program 2023	D	16.741	15PBJA-23-GG-01257-DNAX	14,487	-
Subtotal - 16.741				554,838	-

County of San Diego, California
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
Paul Coverdell Forensic Sciences Improvement Grant Program:					
Passed Through California Governor's Office of Emergency Services					
Coverdell 2023	I	16.742	CQ23 19 0370	\$ 95,021	\$ -
Coverdell 2024	I	16.742	CQ24 02 8701	673	-
CQ Coverdell Program	I	16.742	CQ 01 3070	87,009	-
Subtotal - 16.742				<u>182,703</u>	<u>-</u>
Equitable Sharing Program:					
District Attorney Asset Forfeiture Program	D	16.922	CA037023A	37,759	-
Sheriff Asset Forfeiture Program	D	16.922	CA0370000	2,154,353	-
Subtotal - 16.922				<u>2,192,112</u>	<u>-</u>
TOTAL - U.S. DEPARTMENT OF JUSTICE				<u>8,796,888</u>	<u>13</u>
U.S. DEPARTMENT OF LABOR					
COVID-19 Unemployment Insurance:					
Passed Through California State Employment Development Department					
COVID-19 DHR Unemployment Claims EDD Reimbursement	I	17.225	CARES ACT L1325343440	247	-
TOTAL - U.S. DEPARTMENT OF LABOR				<u>247</u>	<u>-</u>
U.S. DEPARTMENT OF TRANSPORTATION					
Highway Safety Cluster:					
State and Community Highway Safety:					
Passed Through California Office of Traffic Safety					
Pedestrian and Bicycle Safety Program	I	20.600	P524009	20,500	20,500
Pedestrian and Bicycle Safety Program	I	20.600	P525040	96,400	96,400
Selective Traffic Enforcement Program (STEP)	I	20.600	PT24171	23,206	-
Selective Traffic Enforcement Program (STEP)	I	20.600	PT25221	89,927	-
Subtotal - 20.600				<u>230,033</u>	<u>116,900</u>
National Priority Safety Programs:					
Passed Through California Office of Traffic Safety					
Alcohol and Drug Impaired Vertical Prosecution Program	I	20.616	D125033	929,450	-
Keep Em Safe Office of Traffic Safety	I	20.616	OP24007	77,795	77,795
Keep Em Safe Office of Traffic Safety	I	20.616	OP25025	172,683	172,683
Improved Testing for Drug Impaired Driving (OTS DID)	I	20.616	D124021	98,731	-
Improved Testing for Drug Impaired Driving (OTS DID)	I	20.616	D125034	285,807	-
Subtotal - 20.616				<u>1,564,466</u>	<u>250,478</u>
Total Highway Safety Cluster (20.600 & 20.616)				<u>1,794,499</u>	<u>367,378</u>
Highway Planning and Construction:					
Passed Through California Department of Transportation					
Emergency Relief Program (ER)	I	20.205	ER-40A0(094)	231,479	-
Highway Bridge Program (HBP)	I	20.205	BHLSCR-5957(062)	80,000	-
Highway Bridge Program (HBP)	I	20.205	BHLSCR-5957(147)	35,681	-
Highway Bridge Program (HBP)	I	20.205	BPMPPL-5957(124)	25,216	-
Highway Bridge Program (HBP)	I	20.205	BRLO-5957(108)	40,000	-
Highway Bridge Program (HBP)	I	20.205	BRLO-NBIL(515)	235,080	-
Highway Bridge Program (HBP)	I	20.205	BRLS-5917(084)	90,733	-
Highway Bridge Program (HBP)	I	20.205	BRLS-5957(118)	15,310	-
Highway Bridge Program (HBP)	I	20.205	BRLS-5957(148)	120,000	-
Highway Safety Improvement Program (HSIP)	I	20.205	HRRRL-5957(150)	21,047	-
Highway Safety Improvement Program (HSIP)	I	20.205	HSIPL-5957(142)	40,000	-
Highway Safety Improvement Program (HSIP)	I	20.205	HSIPL-5957(128)	113,572	-
Subtotal - 20.205				<u>1,048,118</u>	<u>-</u>
Airport Improvement Program, Infrastructure Investment and Jobs Act Programs, and COVID-19 Airports Programs:					
Passed Through California Office of Transportation					
Airport Improvement Program, Infrastructure Investment and Jobs Act Programs, and COVID-19 Airports Programs	D	20.106	3-06-0212-040-2024	4,544,051	-
Airport Improvement Program, Infrastructure Investment and Jobs Act Programs, and COVID-19 Airports Programs	D	20.106	3-06-0192-020-2023	44,788	-
Airport Improvement Program, Infrastructure Investment and Jobs Act Programs, and COVID-19 Airports Programs	D	20.106	3-06-0192-022-2024	3,333,402	-
Subtotal - 20.106				<u>7,922,241</u>	<u>-</u>
Minimum Penalties for Repeat Offenders for Driving While Intoxicated:					
Passed Through California Office of Traffic Safety					
Repeat Driving Under The Influence Offender Program	I	20.608	AL25028	607,611	-
Selective Traffic Enforcement Program (STEP)	I	20.608	PT24171	69,182	-
Selective Traffic Enforcement Program (STEP)	I	20.608	PT25221	149,369	-
Subtotal - 20.608				<u>826,162</u>	<u>-</u>
TOTAL - U.S. DEPARTMENT OF TRANSPORTATION				<u>11,591,020</u>	<u>367,378</u>

County of San Diego, California
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
U.S. DEPARTMENT OF TREASURY					
<u>Equitable Sharing:</u>					
Sheriff Asset Forfeiture US Treasury	D	21.016	CA0370000	\$ 9,542	\$ -
<u>COVID-19 Coronavirus State and Local Fiscal Recovery Funds:</u>					
COVID-19 Coronavirus State and Local Fiscal Recovery Funds	D	21.027	SLFRP0148	89,529,705	12,824,011
TOTAL - U.S. DEPARTMENT OF TREASURY				89,539,247	12,824,011
U.S. ENVIRONMENTAL PROTECTION AGENCY					
<u>Beach Monitoring and Notification Program Implementation Grants:</u>					
Passed Through California State Water Resources Control Board Public Beach Safety	I	66.472	D1614109 Federal Funds	186,278	-
<u>Toxic Substances Compliance Monitoring Cooperative Agreements:</u>					
Passed Through California Department of Toxic Substance Control United States/Mexico Border -Toxic Substances Compliance	I	66.701	23-T5241	82,470	-
TOTAL - U.S. ENVIRONMENTAL PROTECTION AGENCY				268,748	-
U.S. ELECTION ASSISTANCE COMMISSION					
<u>Help America Vote Act Requirements Payments:</u>					
Passed Through California Secretary of State Help America Vote Act (HAVA)	I	90.401	21G30113	56,000	-
TOTAL - U.S. ELECTION ASSISTANCE COMMISSION				56,000	-
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES					
<u>Aging Cluster:</u>					
<u>Special Programs for the Aging, Title VII, Chapter 3, Programs for Prevention of Elder Abuse, Neglect, and Exploitation:</u>					
Passed Through California Department of Aging Title VII-B Elder Abuse	I	93.041 ⁽¹⁾	AAA-2425-23	39,220	-
<u>Special Programs for the Aging, Title VII, Chapter 2, Long Term Care Ombudsman Services for Older Individuals:</u>					
Passed Through California Department of Aging Title VII-A Ombudsman	I	93.042 ⁽¹⁾	AAA-2425-23	114,150	-
<u>Special Programs for the Aging, Title III, Part D, Disease Prevention and Health Promotion Services:</u>					
Passed Through California Department of Aging Title III-D Health Prevention	I	93.043 ⁽¹⁾	AAA-2425-23	270,114	-
<u>COVID-19 Special Programs for the Aging, Title III, Part D, Disease Prevention and Health Promotion Services:</u>					
Passed Through California Department of Aging COVID-19 American Rescue Plan (ARP) Title D Subtotal - 93.043	I	93.043 ⁽¹⁾	AP-2122-23 2101CAPH6-00	134,032	-
				404,146	-
<u>Special Programs for the Aging, Title III, Part B, Grants for Supportive Services and Senior Centers:</u>					
Passed Through California Department of Aging Title III-B Supportive Services	I	93.044	AAA-2425-23	3,040,082	538,135
<u>COVID-19 Special Programs for the Aging, Title III, Part B, Grants for Supportive Services and Senior Centers:</u>					
Passed Through California Department of Aging COVID-19 American Rescue Plan (ARP) for Supportive Services under Title III-B of the OAA Subtotal - 93.044	I	93.044	AP-2122-23 2101CASSC6-00	253,992	34,892
				3,294,074	573,027
<u>Special Programs for the Aging, Title III, Part C, Nutrition Services:</u>					
Passed Through California Department of Aging Title III C1 Senior Nutrition	I	93.045	AAA-2425-23	7,803,458	6,934,093
<u>COVID-19 Special Programs for the Aging, Title III, Part C, Nutrition Services:</u>					
Passed Through California Department of Aging COVID-19 American Rescue Plan (ARP) COVID-19 American Rescue Plan (ARP) Subtotal	I	93.045	AP-2122-23 2101CAHD6-00	3,708,066	3,419,565
Subtotal - 93.045	I	93.045	AP-2122-23 2101CACM6-00	35,320	35,320
				3,743,386	3,454,885
				11,546,844	10,388,978

⁽¹⁾ Denotes that the program is part of the Aging Cluster at the request of the California Department of Aging.

County of San Diego, California
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
National Family Caregiver Support, Title III, Part E:					
Passed Through California Department of Aging Title III E Family Caregiver Program	I	93.052 ⁽¹⁾	AAA-2425-23	\$ 1,503,260	\$ 1,166,017
COVID-19 National Family Caregiver Support, Title III, Part E:					
Passed Through California Department of Aging COVID-19 American Rescue Plan (ARP) Title III E Subtotal - 93.052	I	93.052 ⁽¹⁾	AP-2122-23 2101CAFFCC6-00	442,907	399,240
				<u>1,946,167</u>	<u>1,565,257</u>
Nutrition Services Incentive Program:					
Passed Through California Department of Aging Nutrition Services Incentive Program (NSIP) Total Aging Cluster (93.041, 93.042, 93.043, 93.044, 93.045, 93.052 & 93.053)	I	93.053	AAA-2425-23	458,519	458,519
				<u>17,803,120</u>	<u>12,985,781</u>
Temporary Assistance for Needy Families:					
Passed Through California Department of Social Services Cal-Learn Services Administration	I	93.558	2401CATANF	617,064	-
CalWORKS Administration	I	93.558	2401CATANF	37,616,328	-
CalWORKS Child Care Stage 1 Administration	I	93.558	2401CATANF	7,008,906	1,839,467
CalWORKS Expanded Subsidized Employment Administration	I	93.558	2401CATANF	3,846,148	3,692,696
CalWORKS Family Stabilization Administration	I	93.558	2401CATANF	15,077,127	12,990,539
CalWORKS Fraud Incentives Administration	I	93.558	2401CATANF	856,416	-
CalWORKS Housing Support Administration	I	93.558	2401CATANF	12,051,805	12,051,846
CalWORKS Welfare to Work Administration	I	93.558	2401CATANF	31,254,015	20,478,181
Emergency Assistance Foster Care	I	93.558	2501CATANF	724,551	219,746
Home Visiting Initiative Administration	I	93.558	2401CATANF	2,146,364	2,146,364
Temporary Assistance for Needy Families (TANF)	I	93.558	2501CATANF	50,465,804	-
Temporary Assistance for Needy Families Emergency Assistance Administration Subtotal - 93.558	I	93.558	2401CATANF	19,527,164	510,036
				<u>181,191,692</u>	<u>53,928,875</u>
CCDF Cluster:					
Child Care and Development Block Grant:					
Passed Through California Department of Education Child Care Local Planning Council Total CCDF Cluster (93.575)	I	93.575	CLPC 4034	144,671	144,671
				<u>144,671</u>	<u>144,671</u>
Medicaid Cluster:					
Medical Assistance Program:					
Passed Through California Department of Aging Multi Purpose Senior Services Program (MSSP)	I	93.778	MS-2425-07	1,295,154	-
Passed Through California Department of Health Care Services					
Cal Aim Path - California Advancing and Innovating Medical Initiative Providing Access and Transforming Health	I	93.778	AB 133	2,161,784	-
California Children Services Medi-Cal	I	93.778	CCS information notice	8,004,405	-
California Children Services -Monitoring and Oversight	I	93.778	CCS information notice 24-04	199,701	-
DHCS Path II Round 2	I	93.778	11-W-00193/9	486,993	-
DHCS Path II Round 3	I	93.778	11-W-00193/9	632,532	-
Foster Care Admin HCPCFC Base - County-City/Federal	I	93.778	CHDP PROGRAM LETTER	2,377,835	-
Health Care Program for Children in Foster Care - Admin	I	93.778	HCPCFC PROGRAM LT 24-01	110,449	-
Health Care Program for Children in Foster Care - Augmented Caseload Relief	I	93.778	CHDP Program Letter	332,905	-
Health Care Program for Children in Foster Care (HCPCFC Base - State/Federal)	I	93.778	CHDP Program Letter	624,828	-
Health Care Program for Children in Foster Care Psychotropic Medication Monitoring and Oversight	I	93.778	CHDP Program Letter	174,561	-
Medical Administration	I	93.778	250SCASMAP	81,994,532	-
Medical Assistance Program	I	93.778	19-96017	633,075	-
Medical Assistance Program Juvenile Referrals	I	93.778	CHDP Program Letter	81,541	-
HSEC-County Based Medi-Cal Administrative Activities	I	93.778	DHCS CMAA Evergreen PA - San Diego	1,212,327	-
PHN-County Based Medi-Cal Administrative Activities	I	93.778	DHCS CMAA Evergreen PA - San Diego	7,736,694	-
PHS-County Based Medi-Cal Administrative Activities	I	93.778	DHCS CMAA Evergreen PA - San Diego	2,910,236	-
Probation Medi-Cal Administrative Activities	I	93.778	NONE	159,275	-
Probation PATH	I	93.778	PATH	1,128,850	-
Providing Access and Transforming Health Justice Involved Round 3 (PATH II Round 3) Subtotal	I	93.778	884793	1,007,574	-
				<u>111,970,097</u>	-
Passed Through California Department of Public Health					
California Home Visiting Program - Evidence Based Home Visiting	I	93.778	CDPH LETTER 05-29-2024	471,074	-
California Home Visiting Program - Maternal Infant and Early Childhood Home Visiting	I	93.778	CDPH LETTER 05-29-2024	438,839	-
Childhood Lead Poisoning Prevention Program	I	93.778	23-10276	17,399	-
Perinatal Equity Initiative Subtotal	I	93.778	24-37 SAN DIEGO	128,086	-
				<u>1,055,398</u>	-

⁽¹⁾ Denotes that the program is part of the Aging Cluster at the request of the California Department of Aging.

County of San Diego, California
Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
Passed Through California Department of Social Services					
Adult Protective Services Health Related Administration	I	93.778	2505CASMAP	\$ 11,371,097	\$ -
Child Welfare Services Health Related Administration	I	93.778	2505CASMAP	25,569,211	4,652,673
In Home Support Services Health Related Administration	I	93.778	2505CASMAP	37,847,912	-
In Home Supportive Services (IHSS) Public Authority-Community First Choice Option (CFCO)	I	93.778	Entitlement	18,715,323	-
In Home Supportive Services (IHSS) Public Authority - IHSS Plus Option (IPO)	I	93.778	Entitlement	301,898	-
In Home Supportive Services (IHSS) Public Authority - IHSS Plus Option (PCSP)	I	93.778	SOC 448 SAN DIEGO	5,551,692	-
In Home Supportive Services (IHSS) Public Authority - IHSS Plus Option (WPCS)	I	93.778	ACL 19-101	1,992,645	-
Subtotal				101,349,778	4,652,673
Total Medicaid Cluster (93.778)				215,670,427	4,652,673
Public Health Emergency Preparedness:					
Passed Through California Department of Public Health					
Public Health Emergency Preparedness-Base	I	93.069	22-10677	1,905,402	-
Public Health Emergency Preparedness-Cities Readiness Initiative (CRI)	I	93.069	22-10677	1,331,460	-
Public Health Emergency Preparedness-Laboratory	I	93.069	22-10677	330,676	-
Subtotal - 93.069				3,567,538	-
Environmental Public Health and Emergency Response:					
Centers for Disease Control and Prevention (CDC) Environmental Health Capacity					
	D	93.070	NUE1EH001415-05-00	39,972	-
Medicare Enrollment Assistance Program:					
Passed Through California Department of Aging					
Medicare Improvements for Patients and Providers Act (MIPPA)	I	93.071	MI-2324-23	110,542	107,918
Medicare Improvements for Patients and Providers Act (MIPPA)	I	93.071	MI-2425-23	19,408	-
Subtotal - 93.071				129,950	107,918
Guardianship Assistance:					
Passed Through California Department of Social Services					
Guardianship Assistance Program- Title IV-E (FED GAP)	I	93.090	2501CAGARD	1,888,199	-
KINGAP Title IV-E Administration	I	93.090	2401CAGARD	65,906	-
Subtotal - 93.090				1,954,105	-
Project Grants and Cooperative Agreements for Tuberculosis Control Programs:					
Tuberculosis Prevention and Control	D	93.116	1 NUS2PS910251-01-00	918,804	-
Tuberculosis Prevention and Control	D	93.116	6 NUS2PS910228-05-05	115,967	-
Subtotal - 93.116				1,034,771	-
Projects for Assistance in Transition from Homelessness (PATH):					
Passed Through California Department of Health Care Services					
Projects for Assistance in Transition from Homelessness (PATH)	I	93.150	2X065M060005-13	576,115	559,376
Immunization Cooperative Agreements:					
Passed Through California Department of Public Health					
Immunization Action Plan	I	93.268	22-10537	1,672,566	-
COVID-19 Immunization Cooperative Agreements:					
Passed Through California Department of Public Health					
COVID19 Immunization Covid Cares	I	93.268	22-10537	5,218,843	1,049,862
Subtotal - 93.268				6,891,409	1,049,862
Racial and Ethnic Approaches to Community Health					
San Diego Racial and Ethnic Approaches to Community Health (SDR)	D	93.304	6 NU58DP007635-01-01	262,752	-
San Diego Racial and Ethnic Approaches to Community Health (SDR)	D	93.304	6 NU58DP007635-02-03	649,973	-
Subtotal - 93.304				912,725	-
CDC Partnership, Strengthening Public Health Laboratories					
Passed Through Association of Public Health Laboratories					
PH Laboratory Fellowship Program	I	93.322	MOA 9835 AMEND 01	10,000	-
PH Laboratory Response Network Integration (With Staffing (RITM I-track))	I	93.322	IC-3659	247,000	-
Subtotal - 93.322				257,000	-
Epidemiology and Laboratory Capacity for Infectious Diseases (ELC):					
Passed Through Public Health Foundation Enterprises Inc.					
E Gonococcal ISP	I	93.323	6NU50CK000410	5,079	-

County of San Diego, California
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Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
<u>COVID-19 Epidemiology and Laboratory Capacity for Infectious Diseases (ELC):</u>					
Passed Through California Department of Public Health					
COVID-19 ELC Enhancing Detection Funding Expansion	I	93.323	COVID-19ELC95	\$ 20,812,836	\$ 142,421
COVID-19 ELC Enhancing Detection Funding Original	I	93.323	COVID-19ELC37	626,583	-
COVID-19 ELC Enhancing Detection Funding Original	I	93.323	COVID-19ELC95	1,472,753	-
COVID-19 ELC Strengthening HAI AR Program Capacity	I	93.323	ELCPHLSHARP-07	165,767	-
Subtotal				23,077,939	142,421
Passed Through Helina Health					
Community Surveillance	I	93.323	6NU50CK000539-01-10	136,028	-
Subtotal - 93.323				23,219,046	142,421
<u>State Health Insurance Assistance Program:</u>					
Passed Through California Department of Aging					
Health Insurance Counseling and Advocacy Program (HICAP)	I	93.324	HI-2425-23	125,480	121,452
Health Insurance Counseling and Advocacy Program (HICAP)	I	93.324	HI-2526-23	97,593	78,272
Subtotal - 93.324				223,073	199,724
<u>COVID-19 Public Health Emergency Response: Cooperative Agreement For Emergency Response: Public Health Crisis Response</u>					
Passed Through California Department of Public Health					
COVID-19 Public Health Workforce Supplemental Funding	I	93.354	1 NU90TP922174-01-00	116,109	-
COVID-19 Public Health Workforce Supplemental Immunization For Safe Schools	I	93.354	1 NU90TP922174-01-00	79,502	12,825
Subtotal - 93.354				195,611	12,825
<u>COVID-19 Activities to Support State, Tribal, Local and Territorial (STLT) Health Department Response to Public Health or Healthcare Crises</u>					
COVID-19 Health Disparities	D	93.391	6 NH75OT000049-01-08	2,772,040	1,773,875
<u>Congressional Directives</u>					
Mobile Crisis Response Teams (MCRT)					
Community Project Funding Congressionally Directed Spending-Construction	D	93.493	1H79FG001051-01	2,369,849	2,330,938
Community Project Funding Congressionally Directed Spending-Construction	D	93.493	1 CE1HS53542-01-00	168,833	-
Subtotal - 93.493				2,538,682	2,330,938
<u>COVID-19 Community Health Workers for Public Health Response and Resilient</u>					
COVID-19 Community Health Workers for Public Health Response and Resilient	D	93.495	6 NU58DP006987-03-01	851,642	701,694
<u>Marylee Allen Promoting Safe and Stable Families Program:</u>					
Passed Through California Department of Social Services					
Promoting Safe and Stable Families Administration	I	93.556	2402CAFPS5	2,524,456	1,430,085
Family First Transition Act	I	93.556	CFL 20/21-91	1,378,992	-
Subtotal - 93.556				3,903,448	1,430,085
<u>Child Support Services:</u>					
Passed Through California Department of Child Support Services					
Child Support Services	I	93.563	2001CACSE5	37,067,947	-
<u>Refugee and Entrant Assistance State/Replacement Designee Administered Programs:</u>					
Passed Through California Department of Social Services					
Additional Ukraine Supplemental Appropriations Act	I	93.566	AUSAA 2022-03	346,932	311,544
Afghan Refugee Support Services	I	93.566	ASA 2203	1,250,399	416,100
Afghan Refugee Support Services	I	93.566	ASOR 2204	262,188	262,188
Afghan Refugee Support Services Supplement	I	93.566	ASA 2302	79,474	79,474
Housing Assistance for Ukrainians	I	93.566	HAU 2023-05	1,497,596	1,372,568
Refugee Admin	I	93.566	2501CARCMA	1,823	-
Refugee and Entrant Assistance- State Administered Programs	I	93.566	2501CARCMA	46,889	-
Refugee Support Services	I	93.566	RSS 2205	3,870,226	3,473,017
Refugee Support Services	I	93.566	RSS 2305	341,096	-
Services for Older Refugees	I	93.566	SOR 2205	24,891	24,891
Services for Older Refugees	I	93.566	SOR 2305	55,705	55,705
Subtotal				7,777,219	5,995,487
Passed Through California Department of Public Health					
Refugee Health Assessment Program	I	93.566	23-37-90899-00	179,230	-
Refugee Health Assessment Program	I	93.566	24-37-90899-00	306,029	-
Subtotal				485,259	-
Subtotal - 93.566				8,262,478	5,995,487

County of San Diego, California
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Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
Community Services Block Grant:					
Passed Through California Department of Community Services And Development					
Community Service Block Grant	I	93.569	24F-3036 DISCRETIONARY	\$ 26,000	\$ 25,745
Community Service Block Grant	I	93.569	24F-3036	1,727,376	1,009,472
Community Service Block Grant	I	93.569	25F-6036	1,898,195	1,414,883
Subtotal - 93.569				3,651,571	2,450,100
Refugee and Entrant Assistance Discretionary Grants:					
Passed Through California Department of Public Health RHPP Refugee Health Promotion Program	I	93.576	24-37-52801-RHPP	29,530	-
Community-Based Child Abuse Prevention Grants:					
Passed Through California Department of Social Services Community Based Child Abuse Prevention	I	93.590	CBCAP	230,299	228,754
Adoption and Legal Guardianship Incentive Payments Program:					
Passed Through California Department of Social Services Child Welfare Services Adoption and Legal Guardianship Incentive Payments ADM	I	93.603	2401CAAIPP	197,897	187,979
Stephanie Tubbs Jones Child Welfare Services Program:					
Passed Through California Department of Social Services Child Welfare Services Title IV-B Administration	I	93.645	2403CACWSS	2,547,573	536,690
Foster Care Title IV-E:					
Passed Through California Department of Social Services Child and Family Teams Administration	I	93.658	2401CAFOST	521,547	528,727
Child Welfare Services Case Record Review Administration	I	93.658	2401CAFOST	604,582	-
Child Welfare Services Level of Care Protocol Administration	I	93.658	2401CAFOST	908,584	-
Child Welfare Services Outcome Improvement Project	I	93.658	2401CAFOST	203,902	186,206
Child Welfare Services Title IV-E Non Waiver Administration	I	93.658	2401CAFOST	20,446,653	325,955
Commercially Sexually Exploited Children Program Administration	I	93.658	2401CAFOST	343,808	59,218
Emergency Child Care Bridge Program Administration	I	93.658	2401CAFOST	112,727	112,214
Excellence in Family Finding Engagement and Support	I	93.658	CFL 22-23_52	58,040	-
Family First Preservation Services	I	93.658	CFL 21/22_110	2,772,091	914,324
Family Preservation Program Administration	I	93.658	2401CAFOST	405,732	-
Foster Care Administration	I	93.658	2401CAFOST	3,365,160	-
Foster Care Assistance Probation	I	93.658	Entitlement	373,810	373,810
Foster Care Funding Certainty Grant	I	93.658	ACL 20/21-47	2,503,598	-
Foster Care Title IV-E Probation	I	93.658	2401CAFOST	982,220	-
Foster Care Title IV-E	I	93.658	2401CAFOST	6,853,925	4,439,592
Foster Parent Training and Recruitment Administration	I	93.658	2401CAFOST	319,166	45,205
Funding Certainty	I	93.658	2401CAFOST	5,539,341	-
Group Home Monthly Visits Administration	I	93.658	2401CAFOST	98,679	-
Kinship and Foster Care Emergency Admin	I	93.658	2401CAFOST	16,719	16,606
Resource Family Approval Admin	I	93.658	2401CAFOST	3,348,437	-
Statewide Automated Child Welfare Information System Administration	I	93.658	2401CAFOST	27,759	-
Substance Abuse /Human Immunodeficiency Virus Infant Administration	I	93.658	2401CAFOST	147,265	-
Subtotal - 93.658				49,953,745	7,001,857
Adoption Assistance:					
Passed Through California Department of Social Services Adoption Administration	I	93.659	2401CAADPT	2,703,703	-
Adoption Assistance Title IV-E	I	93.659	2401CAADPT	38,654,148	-
Adoption Assistance Title IV-E Administration	I	93.659	Entitlement	563,787	1,413,550
Subtotal - 93.659				41,921,638	1,413,550
Social Services Block Grant:					
Passed Through California Department of Social Services Child Welfare Services Title XX Administration	I	93.667	2401CASOSR	4,297,596	-
Title XX Foster Care Assistance	I	93.667	2501CASOSR	1,061,480	1,061,480
Subtotal - 93.667				5,359,076	1,061,480
John H. Chafee Foster Care Program for Successful Transition to Adulthood:					
Passed Through California Department of Social Services Independent Living Program Administration	I	93.674	2402CACILP	738,651	712,551
Ending the HIV Epidemic: A Plan for America - Ryan White HIV/AIDS Program Parts A and B:					
Ending HIV Epidemic Ryan White HIV/AIDS Program Part A and B	D	93.686	6 UT8HA33959-05-01	906,935	643,538
Ending HIV Epidemic Ryan White HIV/AIDS Program Part A and B	D	93.686	6 UT8HA33959-06-03	676,812	552,221
Subtotal - 93.686				1,583,747	1,195,759

County of San Diego, California
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Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
<u>Elder Abuse Prevention Interventions Program:</u>					
Passed Through California Department of Social Services APS COVID Admin	I	93.747	CFL 20/21-95	\$ 697,086	\$ -
<u>Children's Health Insurance Program:</u>					
Passed Through California Department of Health Care Services California Children Services MC - TLICP	I	93.767	CCS information notice	1,521,315	-
<u>Maternal, Infant and Early Childhood Home Visiting Grant:</u>					
Passed Through California Department of Public Health California Home Visiting Program	I	93.870	CHVP 23-37	909,854	-
California Home Visiting Program - American Rescue Plan	I	93.870	CHVP ARP 22-37	50,191	-
Subtotal - 93.870				<u>960,045</u>	-
<u>National Bioterrorism Hospital Preparedness Program:</u>					
Passed Through California Department of Public Health Hospital Preparedness Program (HPP)	I	93.889	22-10677	1,534,483	-
<u>Minority HIV/AIDS Fund (MHAF)</u>					
Status Neutral Approach For Minority HIV/AIDS	D	93.899	1-U1SHA50037-01-00	20,020	-
Status Neutral Approach For Minority HIV/AIDS	D	93.899	6-U1SHA50037-02-02	216,752	150,090
Subtotal - 93.899				<u>236,772</u>	<u>150,090</u>
<u>HIV Emergency Relief Project Grants:</u>					
Ryan White Care Act - Part A	D	93.914	6 H89HA00001-34-03	6,979,080	6,570,168
Ryan White - MAI Supplement - Part A	D	93.914	6 H89HA00001-34-03	469,664	411,611
Ryan White Care Act - Part A	D	93.914	2 H89HA00001-35-00	3,263,480	3,038,341
Ryan White - MAI Supplement - Part A	D	93.914	2 H89HA00001-35-00	167,065	158,269
Subtotal - 93.914				<u>10,879,289</u>	<u>10,178,389</u>
<u>HIV Care Formula Grants:</u>					
Passed Through California Department of Public Health HIV CARE - Part B Program	I	93.917	23-10979	2,205,599	1,377,581
<u>HIV Prevention Activities Health Department Based:</u>					
Passed Through California Department of Public Health HIV Prevention Program	I	93.940	22-10793	113,952	75,184
High Impact HIV Prevention and Surveillance Programs for Health Departments - HIP	I	93.940	24-10521	1,261,597	856,935
High Impact HIV Prevention and Surveillance Programs for Health Departments - Ending the HIV Epidemics (EHE)	I	93.940	24-10569	1,413,246	983,368
Integrated HIV Programs for Health Departments to Support Ending the HIV Epidemic in the United States (CDPH Ending HIV) Comp A	I	93.940	20-10752 A1	174,030	118,097
Subtotal - 93.940				<u>2,962,825</u>	<u>2,033,584</u>
<u>Block Grants for Community Mental Health Services:</u>					
Passed Through Advocates for Human Potential Inc (AHP) Crisis Care Mobile Unit (CCMU)	I	93.958	21-10349	4,234,789	4,234,789
Passed Through California Department of Health Care Services Mental Health Block Grant	I	93.958	3B095M01005-13-51	5,265,310	4,177,485
Subtotal - 93.958				<u>9,500,099</u>	<u>8,412,274</u>
<u>Block Grants for Prevention and Treatment of Substance Abuse:</u>					
Passed Through California Department of Health Care Services Substance Abuse Prevention and Treatment - Adolescent and Youth Treatment Program	I	93.959	1B08T087026-01	644,319	585,744
Substance Abuse Prevention and Treatment-Discretionary	I	93.959	1B08T087026-01	11,342,892	10,311,720
Substance Abuse Prevention and Treatment - Perinatal	I	93.959	1B08T087026-01	1,736,069	1,578,245
Substance Abuse Prevention and Treatment - Prevention	I	93.959	1B08T087026-01	4,553,972	4,115,565
Subtotal				<u>18,277,252</u>	<u>16,591,274</u>
<u>COVID-19 Block Grants for Prevention and Treatment of Substance Abuse:</u>					
Passed Through California Department of Health Care Services COVID-19 Substance Abuse Block Grant - American Rescue (SABG-ARPA)	I	93.959	1B08T083929-01	618,568	618,568
Subtotal - 93.959				<u>18,895,820</u>	<u>17,209,842</u>
<u>Centers for Disease Control and Prevention Collaboration with Academia to Strengthen Public Health:</u>					
Public Health Workforce Infrastructure Modernization	D	93.967	5 NE11OE000026-02-00	1,367,292	-
Public Health Workforce Infrastructure Modernization	D	93.967	5 NE11OE000026-03-00	1,760,520	-
Subtotal - 93.967				<u>3,127,812</u>	-

County of San Diego, California
 Schedule of Expenditures of Federal Awards
 Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
PPHF Geriatric Education Centers:					
Passed Through San Diego State University Geriatrics Workforce Enhancement Program	I	93.969	1 U1QHPS3055-01-00	\$ 80,000	\$ -
COVID-19 Sexually Transmitted Diseases (STD) Prevention and Control Grants:					
Passed Through California Department of Public Health COVID-19 Disease Intervention Specialist (DIS) Workforce Development	I	93.977	21-10581	539,873	-
Maternal and Child Health Services Block Grant to the States:					
Passed Through California Department of Public Health Black Infant Health Program	I	93.994	202437	301,523	-
Maternal, Child & Adolescent Health Program	I	93.994	202437	505,199	-
Subtotal - 93.994				806,722	-
TOTAL - U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES				669,368,929	140,166,685
CORPORATION FOR NATIONAL AND COMMUNITY SERVICE					
AmeriCorps Seniors Retired and Senior Volunteer Program (RSVP) 94.002:					
Retired and Senior Volunteer Program	D	94.002	23SRICA002	107,240	-
TOTAL - CORPORATION FOR NATIONAL AND COMMUNITY SERVICE				107,240	-
EXECUTIVE OFFICE OF THE PRESIDENT					
High Intensity Drug Trafficking Areas Program:					
High Intensity Drug Trafficking Areas - DAO	D	95.001	G10SC0001A	383,886	-
High Intensity Drug Trafficking Areas	D	95.001	G23SC0001A	1,210,531	-
High Intensity Drug Trafficking Areas	D	95.001	G24SC0001A	2,458,318	-
High Intensity Drug Trafficking Areas	D	95.001	G25SC0001A	209,507	-
Subtotal - 95.001				4,262,242	-
TOTAL - EXECUTIVE OFFICE OF THE PRESIDENT				4,262,242	-
U.S. DEPARTMENT OF HOMELAND SECURITY					
Pre-Disaster Mitigation (PDM) Congressionally Directed Spending (CDS):					
Pre-Disaster Mitigation Grant	D	97.143	LPDM24-PJ0009	302	-
Disaster Grants - Public Assistance (Presidentially Declared Disasters):					
Passed Through California Governor's Office of Emergency Services COVID19-FEMA	I	97.036	FEMA-4482-DR-CA	12,117,052	-
Federal Emergency Management Agency Public Assistance Grant	I	97.036	4305DR FEMA	36,350	-
Federal Emergency Management Agency Public Assistance Grant	I	97.036	FEMA-4683-DR-CA	1,417,868	-
Parks - Countywide Park Facility Damages	I	97.036	FEMA-4683-DR-CA PWW 1316	114,019	-
Valley Fire Disaster Grant	I	97.036	FEMA-4569-DR-CA	8,895	-
Winterstorm 2023	I	97.036	FEMA-4683-DR-CA	278,270	-
Subtotal - 97.036				13,972,454	-
Hazard Mitigation Grant:					
Passed Through California Governor's Office of Emergency Services Hazard Mitigation Grant Program	I	97.039	FEMA-4569-DR-CA	29,061	-
Hazard Mitigation Grant Program	I	97.039	FEMA-4683-DR-CA	12,934	-
Home Hardening (State Hazard Mitigation Grant) Mitigation	I	97.039	DR4407-PJ0512	503,497	-
Subtotal - 97.039				545,492	-
Emergency Management Performance Grants:					
Passed Through California Governor's Office of Emergency Services Emergency Management Performance Grants FY24	I	97.042	2024-0050	692,978	55,438
Homeland Security Grant Program:					
Passed Through California Governor's Office of Emergency Services Operation Stonegarden (OPSG) 2021	I	97.067	2021-0081	5,873	-
Operation Stonegarden (OPSG) 2022	I	97.067	2022-0043	6,922,574	-
Operation Stonegarden (OPSG) 2023	I	97.067	2023-0042	4,328,051	-
Operation Stonegarden (OPSG) 2024	I	97.067	2024-0088	1,629,720	-
State Homeland Security Program (SHSP) 2021	I	97.067	2021-0081	839,013	-
State Homeland Security Program (SHSP) 2021 SD-LECC	I	97.067	2021-0095	566,565	-
State Homeland Security Program (SHSP) 2022	I	97.067	2022-0043	1,861,760	1,562,333
State Homeland Security Program (SHSP) 2022 SD-LECC	I	97.067	2022-0043	865,066	-
State Homeland Security Program (SHSP) 2023	I	97.067	2023-0042	675,073	221,998
State Homeland Security Program (SHSP) 2023 SD-LECC	I	97.067	2023-0042	242,712	-
Subtotal				17,936,407	1,784,331

County of San Diego, California
 Schedule of Expenditures of Federal Awards
 Year Ended June 30, 2025

Federal Grantor Federal Program Name County Program Name	Direct(D) Indirect(I)	Assistance Listing Number	Entity's Identifying Number	Federal Expenditures	Pass-Through Amounts to Subrecipients
Passed Through City of San Diego Office of Homeland Security					
Urban Area Security Initiative (UASI) 2020	I	97.067	2020-0095	\$ 216,669	\$ -
Urban Area Security Initiative (UASI) 2022	I	97.067	2022-0043	734,479	-
Urban Area Security Initiative (UASI) 2022 SD-LECC	I	97.067	2022-0043	150,694	-
Urban Area Security Initiative (UASI) 2023	I	97.067	2023-0042	994,665	-
Urban Area Security Initiative (UASI) 2023 SD-LECC	I	97.067	2023-0042	1,395,530	-
Urban Area Security Initiative (UASI) 2024 SD-LECC	I	97.067	2024-0088	32,000	-
Subtotal				<u>3,524,037</u>	<u>-</u>
Subtotal - 97.067				<u>21,460,444</u>	<u>1,784,331</u>
TOTAL - U.S. DEPARTMENT OF HOMELAND SECURITY				36,671,670	1,839,769
TOTAL EXPENDITURES OF FEDERAL AWARDS				\$ 1,212,289,254	\$ 165,793,023

Note 1 - General

The accompanying Schedule of Expenditures of Federal Awards (SEFA) presents the activity of all federal award programs of the County of San Diego, California (County). Federal awards received directly from federal agencies, as well as federal awards passed through other nonfederal agencies, primarily the State of California, are included in the SEFA. The information in the SEFA is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). The County's reporting entity is defined in Note 1 to the County's basic financial statements.

As a result of the COVID-19 pandemic, many new federal programs have been established and funding has been added to existing federal programs. Expenditures funded from the following acts are denoted in the SEFA by the prefix COVID-19 in the federal program name:

- Coronavirus Preparedness and Response Supplemental Appropriations Act
- Families First Coronavirus Response Act
- Coronavirus Aid, Relief, and Economic Security Act (CARES Act)
- Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA)
- American Rescue Plan Act (ARP)

Note 2 - Basis of Accounting

The accompanying SEFA is presented using the modified accrual basis of accounting except for subrecipient expenditures which are recorded on the cash basis, and programs recorded in the County's enterprise funds, which are presented using the accrual basis of accounting, which is described in Note 1 to the County's basic financial statements. There are certain U.S. Department of Health and Human Services programs that are reported on a cash basis in accordance with guidance provided by the California Health and Human Services Agency. Certain U.S. Department of Justice and U.S. Department of Homeland Security programs are reported on a cash basis in accordance with guidance provided by the California Governor's Office of Emergency Services. Finally, in accordance with policy guidance from the Federal Emergency Management Agency (FEMA) the County records expenditures related to the Disaster Grants – Public Assistance program (ALN 97.036) in the SEFA when (1) FEMA has approved the County's Project and (2) the County has incurred eligible expenditures. FEMA has defined a Project as "a logical grouping of work required as a result of the declared major disaster or emergency, with a scope of work and cost estimate." A Project was previously referred to as a Project Worksheet (PW).

Note 3 - Relationship to Basic Financial Statements

Federal award expenditures agree or can be reconciled with the amounts reported in the County's basic financial statements.

Note 4 - Assistance Listing Numbers (ALN)

The ALNs included in the accompanying SEFA were determined based on the federal program name, review of grant contract information, and the U.S. General Services Administration’s SAM.gov website.

Note 5 - Supplemental Nutrition Assistance Program (SNAP)

The County administers the CalFRESH program (federally known as the SNAP program) that is supervised by the State of California. According to guidance provided by the California Department of Social Services, no expenditures are reported in the County’s SEFA except those related to the administration of the program. In fiscal year 2024-25, the State distributed \$899,864,659 in federal SNAP benefits on behalf of the County.

Note 6 - Indirect Cost Rate

With the exception of the following programs, the County has not elected to use the de minimis indirect rate of up to 15 percent as allowed under the Uniform Guidance.

ALN	Entity's Identifying Number	Federal Program Name
10.720	23-DG-11052012-459	Infrastructure Investment and Jobs Act Community Wildfire Defense Grants
10.730	23-DG-11052012-151	Community Project Funds - Congressionally Directed Spending
16.036	15PBJA-23-GG-02267-DNAX	Comprehensive Forensic DNA Analysis Grant Program
16.575	VW23 42 0370, XC23 06 0370	Crime Victim Assistance
20.616	DI25033	National Priority Safety Programs
21.027	SLFRP0148	Coronavirus State and Local Fiscal Recovery Fund
66.472	D1614109 Federal Funds	Beach Monitoring and Notification Program Implementation Grants
93.116	6 NUS2PS910228-05-05, 1 NUS2PS910251-01-00	Project Grants and Cooperative Agreements for Tuberculosis Control Programs
93.150	2X06SM060005-13	Projects for Assistance in Transition from Homelessness (PATH)
93.323	COVID-19ELC95	Epidemiology and Laboratory Capacity for Infectious Diseases (ELC)
93.324	HI-2425-23, HI-2526-23	State Health Insurance Assistance Program
93.354	1 NU90TP922174-01-00	Public Health Emergency Response: Cooperative Agreement for Emergency Response: Public Health Crisis Response
93.778	19-96017	Medical Assistance Program
93.899	1-U1SHA50037-01-00, 6-U1SHA50037-02-02	Minority HIV/AIDS Fund (MHAF)
93.914	6 H89HA00001-34-03, 2 H89HA00001-35-00	HIV Emergency Relief Project Grants
93.958	3B09SM01005-13-S1	Block Grants for Community Mental Health Services
93.959	1B08TI087026-01, 1B08TI083929-01	Block Grants for Prevention and Treatment of Substance Abuse
97.036	4305DR FEMA, FEMA-4683-DR-CA	Disaster Grants - Public Assistance (Presidentially Declared Disasters)
97.039	DR4407-PJ0512, FEMA-4569-DR-CA, FEMA-4683-DR-CA	Hazard Mitigation Grant
97.042	2024-0050	Emergency Management Performance Grants
97.067	2020-0095, 2021-0081, 2022-0043, 2023-0042	Homeland Security Grant Program
97.143	LPDM24-PJ0009	Pre-Disaster Mitigation (PDM) Congressionally Directed Spending (CDS)

Note 7 - Senior Farmer’s Market Program

The County administered Senior Farmer’s Market Program is supervised by the California Department of Food and Agriculture. According to guidance provided by the funding agency, no expenditures are reported in the County’s SEFA except those related to the administration of the program, of which there were none in fiscal year 2024-25. In fiscal year 2024-25, the State disbursed \$62,500 in Federal food vouchers on behalf of the County.

Note 8 - Department of Aging Federal/State Share

Beginning with the fiscal year ended June 30, 2006, the California Department of Aging (CDA) requires agencies who receive CDA funding to display state-funded expenditures and federal expenditures for each CDA grant awarded. The County expended the following federal and state amounts under these grants:

	ALN	Federal Expenditures	State Expenditures
	10.561	\$ 1,212,471	\$ 164,663
	93.041	39,220	-
	93.042	114,150	-
	93.043	404,146	-
	93.044	3,294,074	582,289
	93.045	11,546,844	1,350,078
	93.052	1,946,167	-
	93.053	458,519	-
	93.071	129,950	-
	93.324	223,073	488,813
	93.778	1,295,154	1,295,154
Ombudsman Volunteer Recruitment Initiative	N/A	-	429,727
GF Admin (APGA)	N/A	-	100,000
GF III C-1 Augmentation	N/A	-	332,431
GF III C-2 Augmentation	N/A	-	1,619,746
OARR Digital Connection	N/A	-	45,220
OARR Access to Technology	N/A	-	1,558,482
OARR Dignity at Home Fall Prevention	N/A	-	305,756
OARR Senior Infrastructure	N/A	-	537,342
OARR NPIG/OCNP	N/A	-	728,034
OARR Family Caregiver	N/A	-	719
Modernizing Older California Act (Nutrition Meals)	N/A	-	1,540,092
Modernizing Older California Act (Linkages)	N/A	-	2,239,288
		\$ 20,663,768	\$ 13,317,834

Multi-Purpose Senior Services Program (MSSP) ALN 93.778:

MSSP is a Medi-Cal program. Medi-Cal is administered through the California Department of Health Care Services (DHCS). The State of California Department of Aging administers the "MSSP Program" and the funds come from DHCS. Half of the funds are provided by the State General Fund and half are Federal funds. The funds are paid to the County by DHCS. However, the MSSP program started transitioning from a fee-for-services payment structure to Home and Community Based Services (HCBS) Waiver Managed Care under the Coordinated Care Initiative (CCI) effective October 1, 2014. Under the CCI payment model, the Health Plans will reimburse the County/MSSP Provider a capitated rate per member monthly for each plan member enrolled in MSSP.

Federal and State expenditure amounts reported in the table above were obtained from the closeout report.

Note 9 - Medical Assistance Program (Medicaid)

Direct Medi-Cal and Medicare expenditures are excluded from the SEFA. These expenditures represent fees for services and are not included in the SEFA or in determining major federal programs. The County assists the State in determining eligibility and provides Medi-Cal and Medicare services through County owned facilities. Administrative costs related to Medi-Cal and Medicare are included in the SEFA under the Medicaid Cluster (ALN 93.778).

Note 10 - Community Services Block Grants

The California Department of Community Services and Development (CSD) requires agencies who receive CSD funding to include in the Single Audit Report certain revenue, expenditures, and budgetary information for each CSD award.

Community Services Block Grant 24F-3036 (Program Year 2024)
Term: January 1, 2024 to April 30, 2025
ALN 93.569

Description	January 1, 2024 through June 30, 2024	July 1, 2024 through December 31, 2024	January 1, 2025 through April 30, 2025	Total Audited Costs	Total Reported Expenses	Total Budget
REVENUE						
Grant Revenue	\$ 1,843,777	\$ 1,456,470	\$ 270,906	\$ 3,571,153	\$ -	\$ 3,571,153
EXPENDITURES						
Personnel Costs						
Salaries and Wages	341,143	352,048	31,795	724,986	724,986	817,929
Fringe Benefits	230,083	266,153	24,378	520,614	520,614	609,438
Subtotal Personnel Costs	<u>571,226</u>	<u>618,201</u>	<u>56,173</u>	<u>1,245,600</u>	<u>1,245,600</u>	<u>1,427,367</u>
Non-Personnel Costs						
Travel	848	486	-	1,334	1,334	2,000
Facilities/Space	121,885	5	15,609	137,499	137,499	125,000
Consumable Supplies	765	782	-	1,547	1,547	7,176
Equipment Lease/Purchase	12,224	19,783	-	32,007	32,007	38,400
Printing	-	-	-	-	-	100
Subcontractors	1,116,129	811,693	197,779	2,125,601	2,125,601	1,937,480
Other Costs	20,700	5,520	1,345	27,564	27,564	33,630
Subtotal Non Personnel Costs	<u>1,272,551</u>	<u>838,269</u>	<u>214,733</u>	<u>2,325,553</u>	<u>2,325,553</u>	<u>2,143,786</u>
Total Costs	<u>\$ 1,843,777</u>	<u>\$ 1,456,470</u>	<u>\$ 270,906</u>	<u>\$ 3,571,153</u>	<u>\$ 3,571,153</u>	<u>\$ 3,571,153</u>

County of San Diego, California
Notes to Schedule of Expenditures of Federal Awards
Year Ended June 30, 2025

Community Services Block Grant 24F-3036 (Program Year 2024) Discretionary
Term: January 1, 2024 to April 30, 2025
ALN 93.569

Description	July 1, 2024 through December 31, 2024	Total Audited Costs	Total Reported Expenses	Total Budget
REVENUE				
Grant Revenue	\$ 26,000	\$ 26,000	\$ -	\$ 26,000
EXPENDITURES				
Non-Personnel Costs				
Subcontractors	25,745	25,745	25,745	25,745
Other Costs	255	255	255	255
Total Costs	\$ 26,000	\$ 26,000	\$ 26,000	\$ 26,000

Community Services Block Grant 25F-6036 (Program Year 2025)
Term: January 1, 2025 to April 30, 2026
ALN 93.569

Description	January 1, 2025 through June 30, 2025	Total Audited Costs	Total Reported Expenses	Total Budget
REVENUE				
Grant Revenue	\$ 1,898,195	\$ 1,898,195	\$ -	\$ 3,549,776
EXPENDITURES				
Personnel Costs				
Salaries and Wages	222,162	222,162	222,162	519,330
Fringe Benefits	171,778	171,778	171,778	378,176
Subtotal Personnel Costs	393,939	393,939	393,939	897,506
Non-Personnel Costs				
Travel	121	121	121	2,000
Facilities/Space	50,000	50,000	50,000	50,000
Consumable Supplies	558	558	558	7,088
Equipment Lease/Purchase	15,877	15,877	15,877	38,400
Printing	-	-	-	100
Subcontractors	1,414,883	1,414,883	1,414,883	2,520,298
Other Costs	22,817	22,817	22,817	34,384
Subtotal Non Personnel Costs	1,504,255	1,504,255	1,504,255	2,652,270
Total Costs	\$ 1,898,195	\$ 1,898,195	\$ 1,898,195	\$ 3,549,776

Section I – Summary of Auditor’s Results

FINANCIAL STATEMENTS

Type of auditors' report issued	Unmodified
Internal control over financial reporting:	
Material weaknesses identified	No
Significant deficiencies identified not considered to be material weaknesses	Yes
Noncompliance material to financial statements noted?	No

FEDERAL AWARDS

Internal control over major program:	
Material weaknesses identified	No
Significant deficiencies identified not considered to be material weaknesses	Yes
Type of auditor's report issued on compliance for major programs:	Unmodified
Any audit findings disclosed that are required to be reported in accordance with Uniform Guidance 2 CFR 200.516(a)?	Yes

Identification of major programs:

Name of Federal Program or Cluster	Federal Financial Assistance Listing
State Administrative Matching Grants for the Supplemental Nutrition Assistance Program (SNAP)	10.561
Community Development Block Grants/Entitlement Grants (CDBG) and COVID-19 CDBG	14.218
Housing Voucher Cluster	14.871, 14.879
HOME Investment Partnerships Program	14.239
Airport Improvement Program, Infrastructure Investment and Jobs Act Programs, and COVID-19 Airports Programs	20.106
Immunization Cooperative Agreements	93.268
Marylee Allen Promoting Safe and Stable Families Program	93.556
Child Support Services	93.563
Community Service Block Grant	93.569
High Intensity Drug Trafficking Areas Program	95.001
Dollar threshold used to distinguish between Type A and Type B programs:	\$3,636,868
Auditee qualified as low-risk auditee?	Yes

Section II – Financial Statement Findings

2025-001 **SEFA Preparation**
Type of Finding – Significant Deficiency

Criteria:

Government Auditing Standards require management to establish and maintain effective internal control over financial reporting to provide reasonable assurance that financial statements, including supplementary information, are reliable and prepared in accordance with applicable laws and regulations. In addition, 2 CFR 200 requires non-Federal entities to prepare a Schedule of Expenditures of Federal Awards (SEFA) that accurately reports federal awards expended during the fiscal year in accordance with Uniform Guidance requirements, including proper identification, valuation, and classification of federal expenditures. Further, Federal Emergency Management Agency's (FEMA) Public Assistance program requires that entities record expenditures on the Schedule of Expenditures of Federal Awards (SEFA) when (1) FEMA has approved the entity's Project, and (2) the entity has incurred the eligible expenditures.

Condition:

During our audit, we identified that adjustments were required to the SEFA to properly report federal expenditures in accordance with Uniform Guidance. Specifically, FEMA Disaster Grants – Public Assistance expenditures incurred in previous fiscal years for projects approved by FEMA in previous fiscal years were included within the current year federal expenditure amounts.

Cause:

The condition occurred because internal controls over the preparation and review of the SEFA did not consistently ensure that only current year federal expenditures were properly identified, accumulated, and reported in accordance with the Uniform Guidance.

Effect:

As a result, the SEFA required audit adjustments to accurately present federal expenditures. Although the adjustments did not result in a material misstatement of the financial statements taken as a whole, there is an increased risk that errors in federal reporting could occur and not be detected or corrected on a timely basis, which could impact audit planning, major program determination, and reporting under the Uniform Guidance.

Recommendation:

We recommend that management strengthen internal controls over the preparation and review of the SEFA by implementing procedures to:

- Provide training to personnel involved in providing or reporting federal expenditures for the SEFA;
- Ensure federal awards are properly identified and classified in accordance with Uniform Guidance requirements including, but not limited to, accounting for the differences in reporting for amounts provided to subrecipients, expenditures incurred versus when they are reimbursed, and considerations related to program income;
- Reconcile federal expenditures reported on the SEFA to the underlying accounting records and grant documentation and ensure only those expenditures incurred within the current fiscal year (unless specifically modified by the Office of Management and Budget or federal program guidance) are reported; and
- Perform a documented supervisory review of each version of the SEFA prior to submission to ensure completeness and accuracy.

Views of Responsible Officials:

Management agrees. See separately issued Corrective Action Plan.

Section III – Federal Award Findings and Questioned Costs

2025-002 **Program: COVID-19 CDBG-Entitlement/Special Purpose Grants Cluster**
Assistance Listing No.: 14.218
Federal Grantor: U.S. Department of Housing and Urban Development
Passed-through: N/A - Direct Award
Award No.: B20UW060501, B24UC060502
Award Year: 2021, 2025

Compliance Requirements: Reporting
Type of Finding: Significant Deficiency in Internal Control over Compliance

Criteria:

2 CFR Section 200.303(a), Internal Controls, states that the non-Federal entity must establish, document, and maintain effective internal control over the Federal award that provides reasonable assurance that the non-Federal entity is managing the Federal award in compliance with Federal statutes, regulations, and the terms and conditions of the Federal award.

Under the requirements of the Federal Funding Accountability and Transparency Act (FFATA) (Pub. L. No. 109-282), as amended by Section 6202 of Pub. L. No. 110-252, that are codified in 2 CFR Part 170, recipients (i.e., direct recipients) of grants or cooperative agreements are required to report first-tier subawards of \$30,000 or more to the Federal Funding Accountability and Transparency Act Subaward Reporting System (FSRS).

Condition:

As a result of our audit procedures, we noted that for three (3) out of three (3) first tier subawards tested there was no documented review of the FFATA submissions by an individual independent of the preparation of the FFATA submissions.

Cause:

The County's procedures did not include documenting the review and approval of the reports prior to submission.

Effect:

Ineffective controls over this area of compliance could result in reports that are inaccurate or incomplete being submitted or disclosed to the granting agency.

Questioned Costs:

No questioned costs were identified as a result of our audit procedures.

Context/Sampling:

We tested the entire population of three subawards obligations during the year.

Repeat Finding from Prior Years:

No

Recommendation:

We recommend the County revise its procedures to include evidence to document the individual who reviewed and approved required reports prior to submission.

Views of Responsible Officials:

Management agrees. See separately issued Corrective Action Plan.

Financial Statements Findings:

Finding No.	Category	Status of Corrective Action
2024-001	Receivables at Year-End	Implemented

Federal Awards Findings:

None reported.



South Bay Union School District

A community dedicated to achievement for all

Fiscal Services Department
601 Elm Avenue
Imperial Beach, CA 91932
www.sbusd.org

May 15, 2026

Clerk of the County Board of Supervisors
County of San Diego
1600 Pacific Highway
San Diego, CA 92101

COSD CLERK OF THE BOARD
2026 MAY 19 PM2:03

Re: Transmittal of South Bay Union School District Resolution No. 26-013 – Adoption of Statutory School Fees

Dear Sir or Madam:

On May 14, 2026, the Governing Board of the South Bay Union School District (“District”) adopted Resolution No. 26-013 approving the Fee Justification Study (“Fee Study”) and authorizing the levy of statutory school fees on new residential, commercial, and industrial development pursuant to Government Code Section 65995.

Enclosed please find a copy of the adopted resolution, the Fee Study, and a map delineating the boundaries of the area subject to school facility fees. The District has adopted statutory fee amounts of **\$2.37 per square foot for residential construction** and **\$0.38 per square foot for commercial/industrial construction**.

Please also note that at its **January 28, 2026 meeting**, the State Allocation Board (“SAB”) approved new maximum Level 1 statutory fee rates of **\$5.38 per square foot for residential construction** and **\$0.87 per square foot for commercial/industrial construction**.

Pursuant to the existing fee allocation schedule with the Sweetwater Union High School District, Sweetwater is authorized to collect **\$3.00 per square foot** for residential construction and **\$0.49 per square foot** for commercial/industrial construction, except that rental self-storage projects are limited to **\$0.43 per square foot**.

This letter also serves as notification that the appropriate school facility fees must be paid to the District prior to the issuance of any building permit for residential or commercial/industrial development, and that the collection of these fees is **not** subject to Government Code Section 66007(a).

As a reminder, in accordance with Education Code Section 17620, the County may not issue a building permit for any construction within the District’s boundaries unless and until the District has executed a Certificate of Compliance confirming that the required school fees have been paid. We appreciate your timely attention to this matter. Please contact the undersigned with any questions.

Very truly yours,

Superintendent
José Espinoza

Board of Trustees

Manuel Esparza • Kelly Leiker • José Lopez Eguino • Jannet Medina • Cheryl Quinones





South Bay Union School District

A community dedicated to achievement for all

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Imperial Beach, CA 91932
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Mr. Rigo Lara
Assistant Superintendent, Business Services

Enclosures

cc: Tyree Dorward, Best Best & Krieger

Superintendent
José Espinoza

Board of Trustees

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